

colmar brunton

Prepared for: Enterprise Northland

Author(s): Chris Vaughan & Jennifer Mullan

Contact: (09) 919 9200

Issue Date: March 2005

## Why Northland?

Understanding Domestic Visitors To Northland Throughout The Year

*\* Commercial in Confidence \**

Colmar Brunton undertakes all research projects to the highest possible standards and in accord with the principles detailed in the MRSNZ Code of Practice which is based on the ESOMAR Code of Conduct for Market Research.

All methodologies and techniques outlined in this report are provided solely for use by the client.

**Copyright is reserved by Colmar Brunton.**

# Table of Contents

---

- List of Figures and Tables ..... 3
- Background and Objectives ..... 4
- Methodology ..... 5
- Total Market Analysis..... 7
  - Summary..... 9
- Visitor Drivers and Activities ..... 10
  - Segmenting Northland Visitors ..... 12
    - Culture Seekers..... 12
    - Wine & Foodies..... 13
    - Relaxers ..... 13
    - Water Lovers ..... 14
  - Summary..... 14
- Northland As A Destination ..... 15
  - Prompted Drivers For Visiting the Northland Region ..... 17
  - Prompted Activities Associated With the Northland Region..... 18
  - Prompted Places Visitors Would Like To Visit In Northland..... 19
  - Overall ..... 20
  - Summary..... 21
- Comparing the Seasons ..... 22
  - Summary..... 25
- How Does Northland Compare ..... 26
  - Rotorua Region ..... 26
  - Queenstown ..... 28
  - Coromandel ..... 30
  - Taupo ..... 32
  - Overall Comparison ..... 33
  - Hygiene Factors ..... 35
  - Summary..... 36

Information Sources & Visitation Behaviour ..... 37  
    Summary ..... 39  
Summary & Recommendations ..... 40  
Appendix ..... 42

# List of Figures and Tables

---

## Figures

- Figure 1: Actual and Planned Holiday Destinations..... 7
- Figure 2: Combination of Actual and Planned Northland Visitation .....8
- Figure 3: Reasons for Choosing a Holiday Destination..... 10
- Figure 4: Activities Liked To Do While On Holiday..... 11
- Figure 5: Like About Northland as a Holiday Destination ..... 15
- Figure 6: Dislike About Northland as a Holiday Destination..... 16
- Figure 7: Associations with the Northland Region in General ..... 17
- Figure 8: Activities People Like To Do In the Northland Region..... 18
- Figure 9: Places People Would Like To Visit..... 20
- Figure 10: Northland Holiday Aspiration ..... 21
- Figure 11: Associations with the Northland Region over the Seasons ..... 22
- Figure 12: Activities in the Northland Region over the Seasons..... 23
- Figure 13: Places People Would Like to Visit over the Seasons ..... 24
- Figure 14: Associations with the Rotorua Region vs. Northland..... 26
- Figure 15: Activities in the Rotorua Region vs. Northland ..... 27
- Figure 16: Associations with Queenstown vs. Northland..... 28
- Figure 17: Activities in Queenstown vs. Northland ..... 29
- Figure 18: Associations with the Coromandel vs. Northland..... 30
- Figure 19: Activities in the Coromandel vs. Northland ..... 31
- Figure 20: Associations with Taupo vs. Northland ..... 32
- Figure 21: Activities in Taupo vs. Northland ..... 33
- Figure 22: Destinations Brand Map ..... 34
- Figure 23: Information Sources Used For Northland..... 37
- Figure 24: Number of Visitations to the Northland Region ..... 38
- Figure 25: Length of Stay Associated with Northland ..... 38
- Figure 26: Preference Packages or Self Organised Holiday ..... 39

## Tables

- Table 1: Top 5 Activities Associated With Northland by Visitor Type..... 19
- Table 2: Hygiene Factors across Regions ..... 35

# Background and Objectives

---

Enterprise Northland is operated by the Northland Regional Council Community Trust and is focused on facilitating and co-ordinating economic growth across "The First Region of New Zealand" in collaboration with Northland businesses, Northland Iwi, the regional and district councils, the three district economic development agencies, and central government agencies and departments.

The visitor industry is Northland's second largest industry and is currently estimated to be worth more than \$600 million to the region's economy. Northland attracts more than 1.4 million visitors each year and of those 66% are domestic visitors. One of the challenges facing the region is seasonality and the impact it has on business profitability, potential to grow, employ and invest. In order to address seasonality, the region needs to have a good understanding of why visitors choose Northland as a holiday destination during the shoulder and off season, and what opportunities there may be to attract more domestic visitors during this period.

The main business objective for this study has been to identify domestic visitors' perceptions, understanding and motivations when selecting Northland as a holiday destination during the shoulder and off season. This will be used to help develop the appropriate communication strategy.

Specifically the research has measured/determined:

1. Current or potential domestic visitor understanding and perceptions of Northland as a tourism destination
2. The current or potential domestic visitor understanding and perceptions of Northland's tourism "offer" during the shoulder and winter seasons
3. How this differs to their motivation for travel to Northland in the high season
4. The key reasons for domestic travel to the region
5. How domestic visitors find information about Northland
6. For Northland's key domestic competitors during the shoulder and low season, the reasons for domestic travel to those destinations
7. A competitive analysis of visitor's perception of Northland in comparison to the main competing regions (Rotorua, Queenstown, Coromandel, Taupo)
8. How to attract more domestic visitors to the region in the shoulder and off season

# Methodology

---

Web Assisted Personal Interviewing (WAPI) was used for this study

WAPI was used to conduct N=300 fifteen minute online surveys with current and/or potential visitors to Northland from the Auckland and Waikato regions

Colmar Brunton used their representative on-line panel of respondents across the country called CBclique, with approximately 5000 members on this panel, however only those for Auckland or Waikato region were contacted.

Sample consisted of;

- Location
  - Auckland N=262
  - Waikato N=38
- Northland Visitation
  - Visited Northland in last 18 months N=221
  - OR intend to visit Northland in the next 12 months N=200

(all were Northland visitors or potential visitors)

Profile of the sample:

Gender	Sample
Male	46%
Female	54%

Age	Sample
15 to 19 years	2%
20 to 29 years	14%
30 to 39 years	25%
40 to 49 years	24%
50 to 59 years	23%
60+	12%

<b>Ethnicity</b>	<b>Sample</b>
New Zealander/Pakeha	77%
Maori	5%
European	12%
Pacific Islander	2%
Chinese	0%
Indian	2%
Other Asian	0%
Other	1%

<b>Household Structure</b>	<b>Sample</b>
Couple only	32%
Couple with child(ren)	46%
One parent with child(ren)	5%
Group flatting	9%
One-person household	7%

<b>Personal Income</b>	<b>Sample</b>
Under \$15,000	8%
\$15,001 - \$20,000	6%
\$20,001 - \$30,000	9%
\$30,001 - \$40,000	13%
\$40,001 - \$50,000	15%
\$50,001 - \$100,000	34%
\$100,001 or More	7%
Not Stated	8%

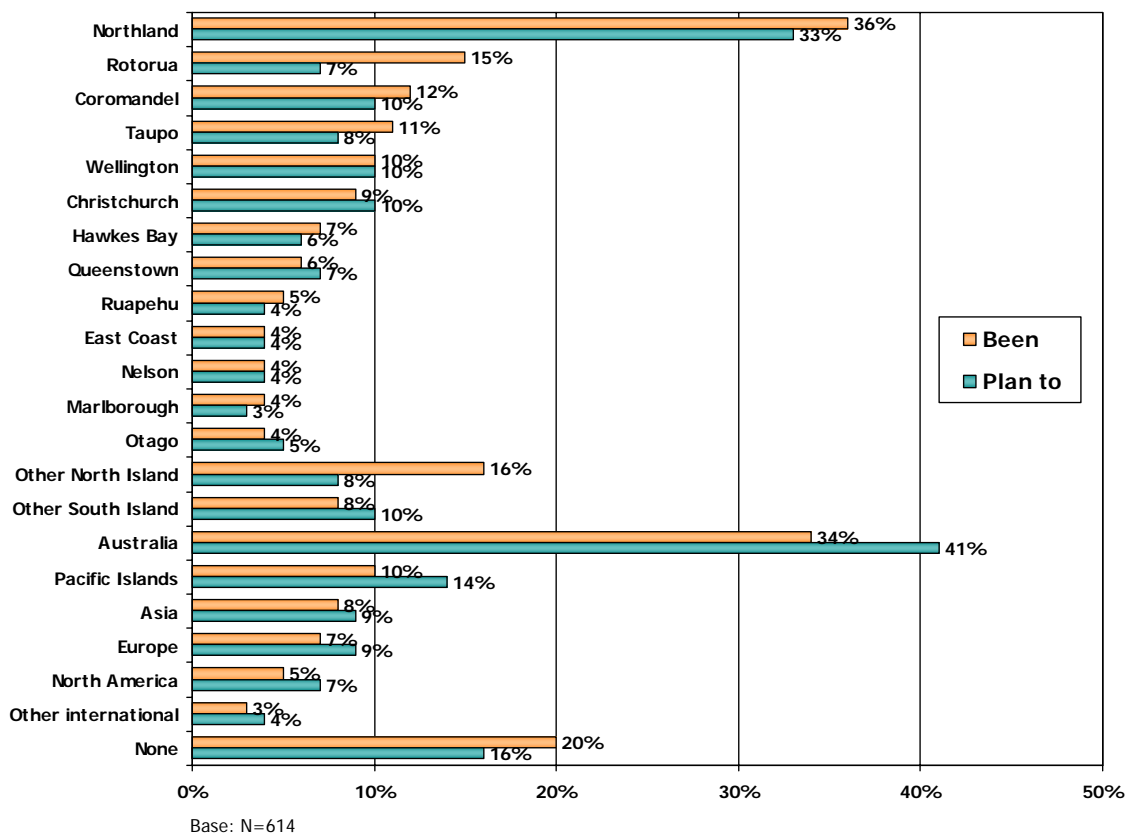
# Total Market Analysis

In total N=614 Auckland/Waikato people responded to the request to take part in the survey.

Those that had or planned to holiday in Northland continued to complete the full survey, but all were asked about their last 18 months/planned next 12 months holidays. Demographics were also collected.

The following chart shows actual and planned Holiday destinations for the total market.

**Figure 1: Actual and Planned Holiday Destinations**



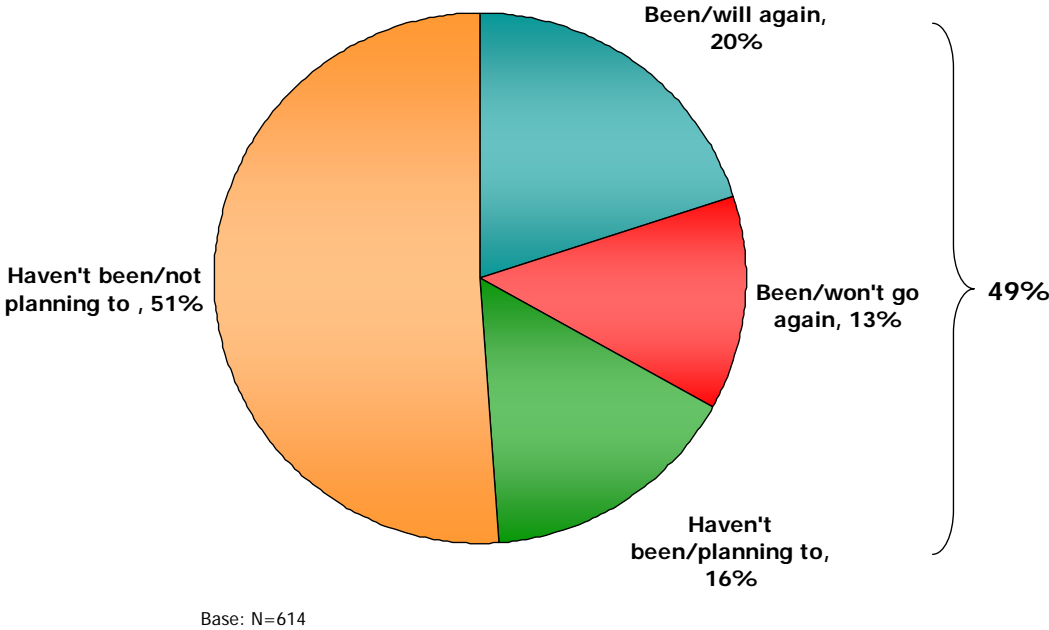
On average people have been to 1.4 New Zealand destinations and 0.7 overseas destinations in the last 18 months; they plan to go to 1.3 New Zealand destinations and 0.8 overseas destinations in the next 12 months. Clearly New Zealand destinations will lose share of total travel (in particular to Australia).

Northland's share of last 18 month destinations is 16%; its share of planned next 12 month destinations is 15%.

Demographically, Northland visitors (last 18 months) tend to be on above average household incomes and in households with pre-school children. There are no differences by age or gender. This income bias is in common with most destinations – higher income people take more holidays in general.

The following pie chart shows the spread of people in terms of the combination of having been and planning to visit Northland.

**Figure 2: Combination of Actual and Planned Northland Visitation**



(Note that 8% of the 614 haven't been anywhere and aren't planning to go anywhere).

Demographically the only difference across these groups are again that people who have been and plan to revisit are more likely to be in households with school aged children and are on above average incomes.

People who have been and will go again mentioned more other New Zealand destinations, in particular;

- Coromandel (been)
- East Coast (plan to go)
- Rotorua (both)
- Wellington (been)
- Nelson (been)

Those who have been but won't go again mentioned Australia (both), Europe (plan to go) and Queenstown (been) more.

The other two groups had been to less places. Those who hadn't been to Northland but plan to also mentioned Australia and Queenstown as planned destinations. The last group had less planned destinations.

## Summary

Northland is clearly the leading New Zealand destination for people in this region – well ahead of the nearest challengers.

Clearly the major competitor, however, is Australia, and overall competition from overseas destinations will increase in future with changes in travel costs.

# Visitor Drivers and Activities

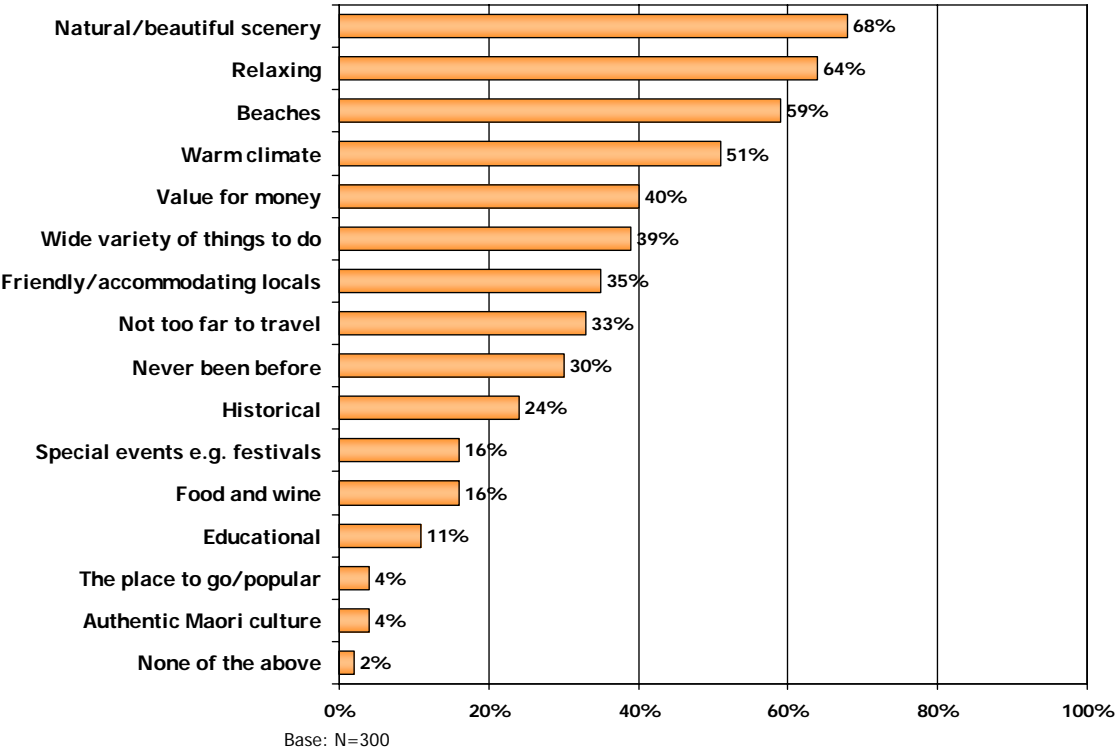
Note: This and following sections are based on Northland visitors (actual/planned)

When looking at reasons for visiting a certain destination and activities associated with that destination, we first looked at reasons behind how visitors choose a holiday destination and what activities they like to do while on holiday.

Visitors were shown a list of reasons for how people choose a holiday destination. They then choose the reasons that best described how they choose a holiday destination.

The following chart shows the reasons why visitors choose a holiday destination.

**Figure 3: Reasons for Choosing a Holiday Destination**

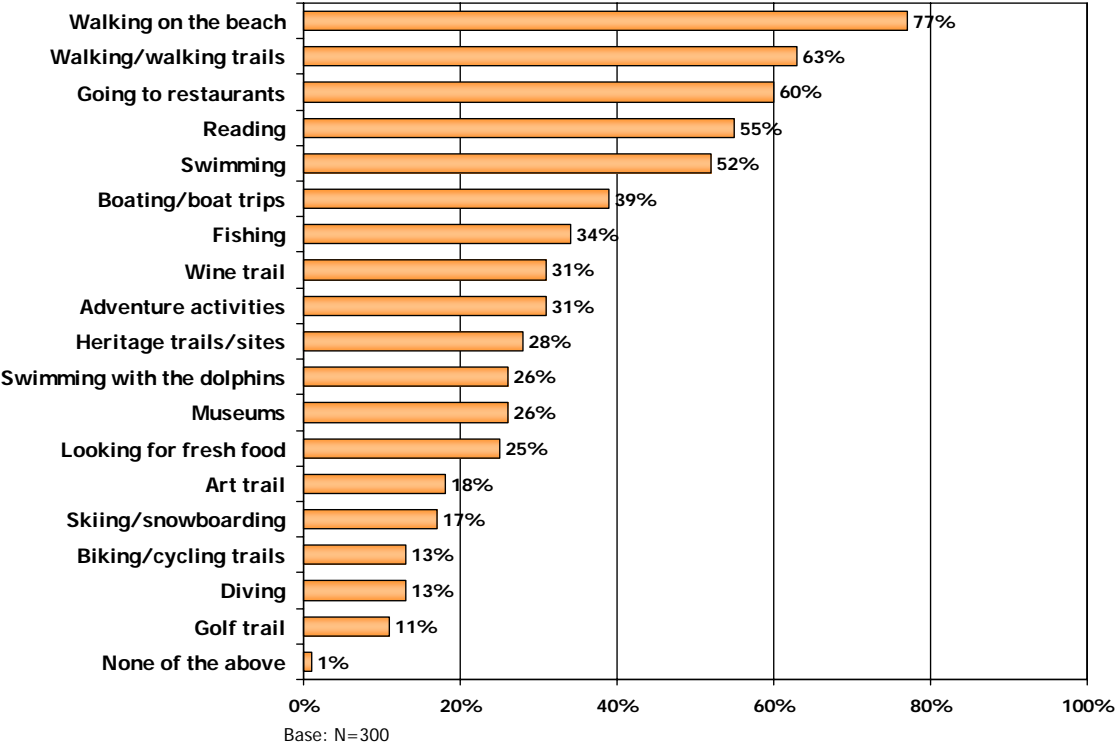


From the chart we can see the key drivers for choosing a destination are natural/beautiful scenery, relaxation, beaches and a warm climate.

Visitors were also shown a list of activities people like to do while on holiday. They then chose the activities they like to do while on holiday.

The following chart shows the activities visitors like to do while on holiday

**Figure 4: Activities Liked To Do While On Holiday**



From the chart we can see that walking on the beach, walking trails and going to restaurants are the main activities people like to do while on holiday.

## Segmenting Northland Visitors

Although these results give us an understanding of general drivers and activities visitors consider when choosing a holiday destination, we know that people have different needs when it comes to a holiday destination. There are some people who have different reasons and enjoy different activities while on holiday and some that enjoy similar things. Those that have similar reasons and enjoy similar activities can be grouped together to better understand Northland current and potential visitors.

In order to see if there were any distinctive groups or segments we conducted a segmentation based on the reasons people choose a holiday destination and on the activities they enjoy doing. People that rated similar reasons or activities were grouped together and analysed for similar patterns of behaviour. This used a combination of Factor and Cluster Analyses.

When we conducted the segmentation of Northland visitors there were four distinct groups;

- Culture Seekers (N=47)
- Wine & Foodies (N=52)
- Relaxers (N=81)
- Water Lovers (N=100)

There was some people (N=20) that did not fit into any group based on their responses.

### Culture Seekers

Culture Seekers are visitors that are after a destination that is educational and historical, also has a wide variety of things to do with friendly accommodating people and in particular authentic Maori culture. They like a little bit of adventure but are also enjoy heritage trails, heritage sites and museums.

Apart from Northland, Australia, Rotorua, Coromandel and Taupo are the main other holiday destinations of this group. Places they would also like to visit include Australia, Hawkes Bay, Wellington, and Christchurch/Canterbury.

Culture Seekers tend to be older couples or older singles in the 50 plus age group and have below average personal incomes.

#### Key Statistics:

<b>Culture Seekers</b>	
Percentage holidayed in Northland in the last 18 months	64%
Percentage planning to holiday in Northland in the next 12 months	72%
Number that have holidayed in Northland more than 3 times	79%
Aspiration to holiday in Northland (out of 10)	8.3

## Wine & Foodies

Wine and Foodies are all about wine and food. They choose a holiday destination based on what it offers in terms of wine and food and enjoy wine trails, going to restaurants, and looking for fresh food. They also enjoy a touch of culture with art and heritage trails.

Apart from Northland, Australia, Rotorua, Taupo, and other North Island are the main other holiday destinations of this group. Places they would also plan to visit include Australia, Christchurch/Canterbury, Asia and Wellington

Amongst the Wine & Foodies there are more females, they have an average personal incomes of \$40,000 to \$80,000, and slightly more Aucklanders are in this group. They seem to consist of two sorts of age structures. Either 20-24 year olds, flatting or young couples with no kids, or 60 plus years, older couples or older singles.

#### Key Statistics:

<b>Wine &amp; Foodies</b>	
Percentage holidayed in Northland in the last 18 months	73%
Percentage planning to holiday in Northland in the next 12 months	67%
Number that have holidayed in Northland more than 3 times	72%
Aspiration to holiday in Northland (out of 10)	7.6

## Relaxers

These are the holidayers that just want to take it easy. Their main criteria for choosing a holiday destination is that it is relaxing. They enjoy walking on the beach and reading.

Apart from Northland, Australia, other North Island, Coromandel, and Pacific Islands are the main other holiday destinations of this group. Places they would also plan to visit include Australia, Pacific Islands, Coromandel and Europe.

Relaxers are high income households, and more are aged 40-49 years. They have older kids at home or they are older couples with no kids at home.

Key Statistics:

<b>Relaxers</b>	
Percentage holidayed in Northland in the last 18 months	78%
Percentage planning to holiday in Northland in the next 12 months	62%
Number that have holidayed in Northland more than 3 times	79%
Aspiration to holiday in Northland (out of 10)	7.5

### Water Lovers

These holidayers want to hit the beach and beaches are the main driver for choosing a destination. They enjoy swimming, boating, fishing, swimming with dolphins, diving - basically anything that involves water! They also into adventure activities and skiing/snowboarding.

Apart from Northland, Australia, Rotorua, Wellington, and other North Island are the main other holiday destinations of this group. Places they would also plan to visit include Australia and the Pacific Islands

Water Lovers are usually families with young kids or young couples, flatters. They are a high income group and most are under 40 years olds, with a skew towards 25-29 year olds.

Key Statistics:

<b>Water Lovers</b>	
Percentage holidayed in Northland in the last 18 months	73%
Percentage planning to holiday in Northland in the next 12 months	72%
Number that have holidayed in Northland more than 3 times	79%
Aspiration to holiday in Northland (out of 10)	7.9

### Summary

There are four distinctive segments that are quite different in what they want from a holiday and from a holiday destination. All of them are Northland visitors therefore it is important to look at each group individually to see what needs are being meet and what are not in the shoulder and off season.

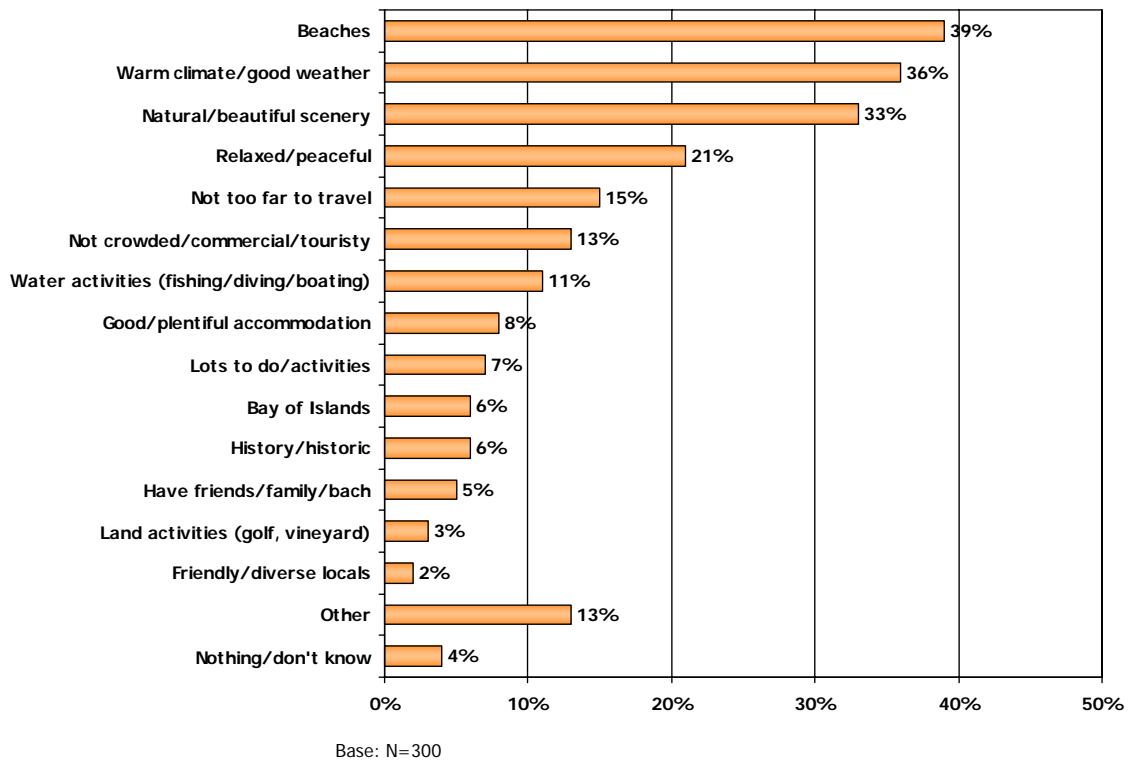
# Northland As A Destination

---

The first question we asked respondents is what do you like and dislike about the Northland region as a holiday destination. This question was open-ended with no prompting.

The following chart shows what people liked about Northland as a holiday destination

**Figure 5: Like About Northland as a Holiday Destination**



Northland rates strongest on its beaches, climate, and natural scenery.

Some of the comments included;

*"Beautiful coastline and scenic region, good fishing, swimming and golfing"*

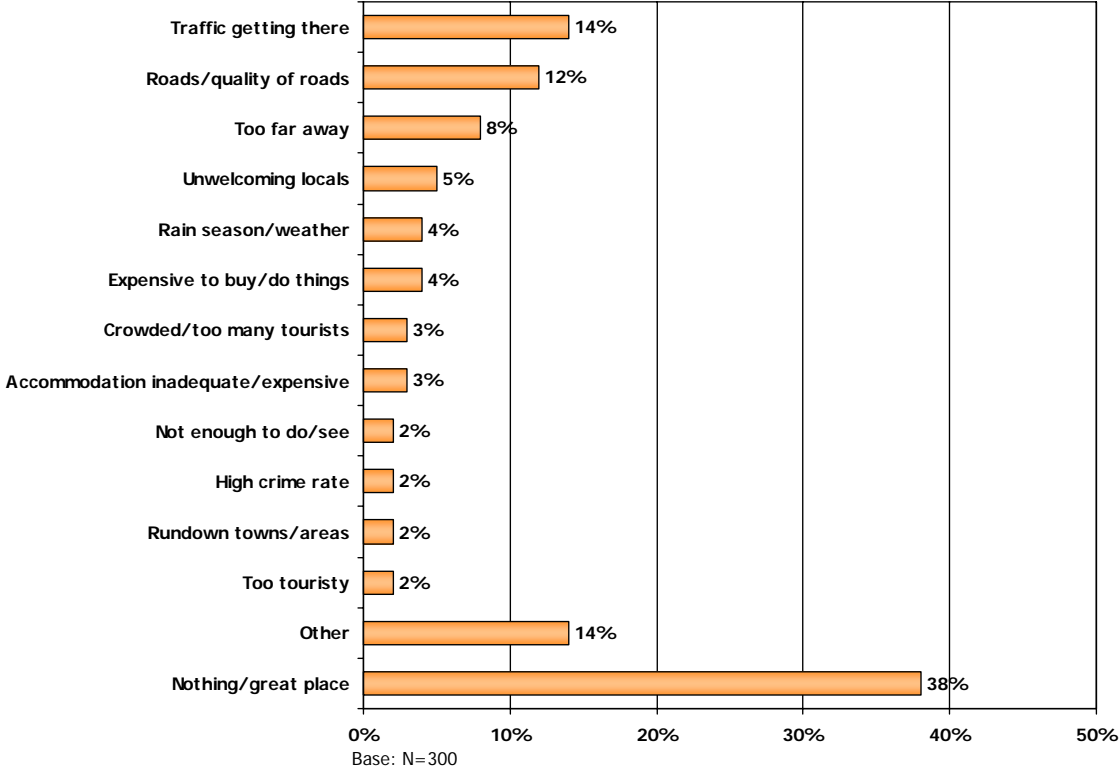
*"Beaches with clear water, great for snorkelling, kayaking, and other water-related activities"*

*"Weather permitting Northland is beautiful. Abundant in natural beauty, natural wonders (e.g. Tane Mahuta) and beaches. It is easy enough to see what Northland and the Bay of Islands has to offer as a holiday destination. It has old world charm with modern technology"*

*"Love the beaches, they are clean, green slow paced, love not having to rush around"*

The following chart shows what people disliked about Northland as a holiday destination

**Figure 6: Dislike About Northland as a Holiday Destination**



Many couldn't rate anything they disliked, however the main areas included traffic, road quality, travel distance and unwelcoming locals.

Some of the comments included;

*"Roads are not the best and dislike having to travel through Auckland"*

*"Locals with a bad attitude, tourist intimidation by some locals"*

*"The traffic from Auckland to Wellsford"*

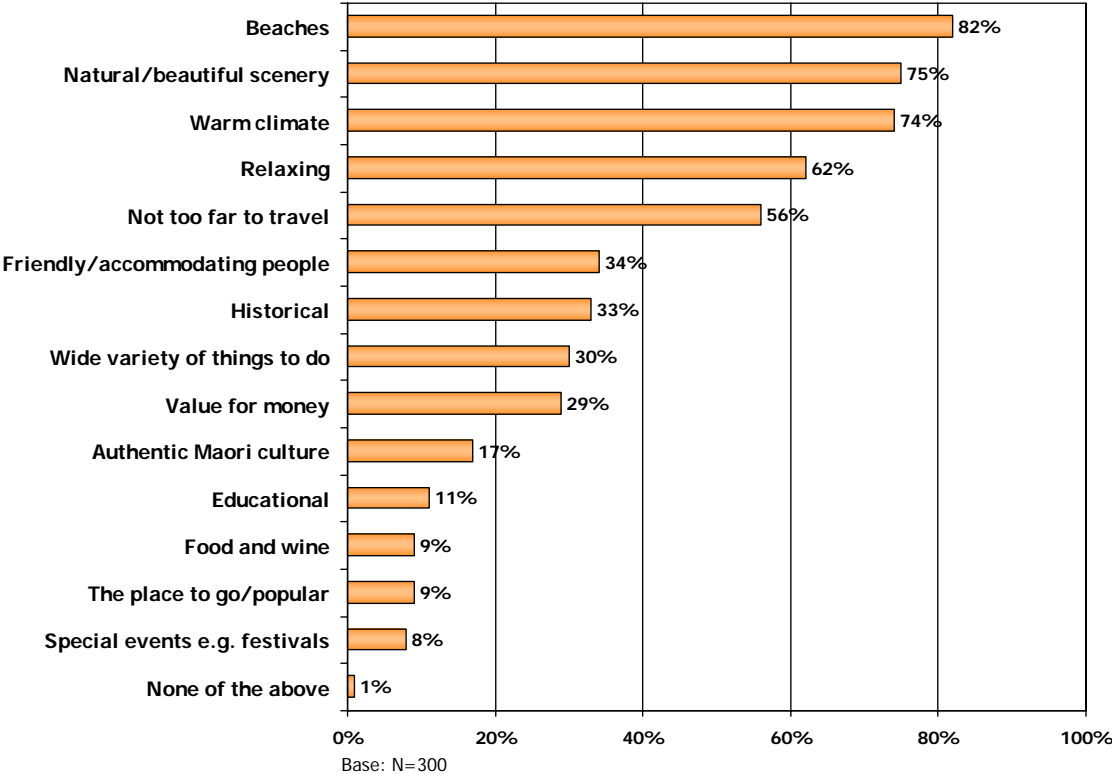
*"Getting stuck in traffic north of Auckland at holiday times"*

# Prompted Drivers For Visiting the Northland Region

Respondents were then presented with a list of different reasons why people choose a New Zealand holiday destination. They chose the attributes they associated with the Northland region in general.

The following charts shows the main drivers associated with the Northland Region

**Figure 7: Associations with the Northland Region in General**



The top five drivers to the Northland region are;

1. Beaches
2. Natural/beautiful scenery
3. Warm Climate
4. Relaxing
5. Not too far to travel

These main drivers were also mentioned unprompted, and tie in with the main overall holiday drivers (see page 10).

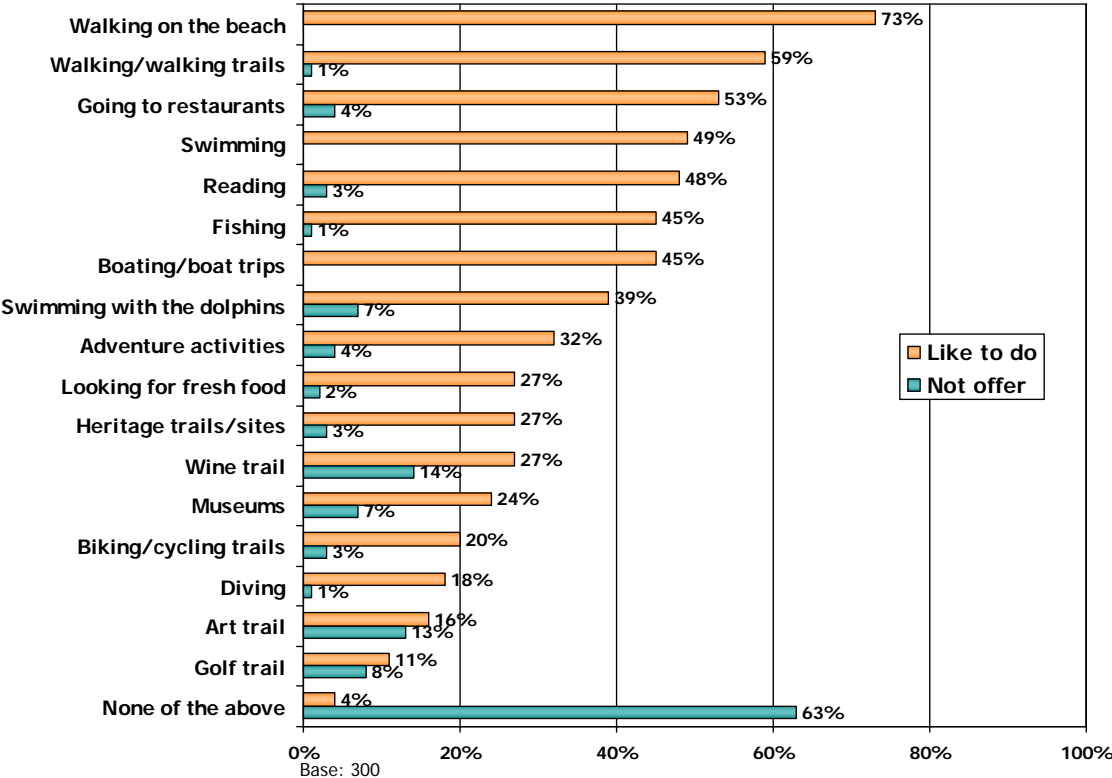
When we split the results by segments, Culture Seekers rated Northland higher in terms of its association with history, education and friendly accommodating people. There were no other differences amongst the other segments.

### Prompted Activities Associated With the Northland Region

Respondents were then presented with a list of different reasons activities people like to do while on holiday. They chose the activities they like to do in the Northland region in general.

The following charts shows the main reasons activities people like to do while taking a holiday in the Northland region

**Figure 8: Activities People Like To Do In the Northland Region**



Activities visitors like to do in Northland is dependant on the type of visitor they are. However, the main ones are;

1. Walking on the beach
2. Walking/walking trails
3. Going to restaurants
4. Swimming
5. Reading

Again, these tally closely with the activities sought overall (see page 11).

As mentioned the activities are quite different depending on their segment. The table below shows the top five activities split by segment. There are some activities that are fairly universal such as walking on the beach and walking trails, but some are more popular based on their reasons for travelling to Northland. The activities that are different have been highlighted in the table.

**Table 1: Top 5 Activities Associated With Northland by Visitor Type**

	Culture Seekers	Wine & Foodies	Relaxers	Water Lovers
1	Walking on beach	Walking on beach	Walking on beach	Fishing
2	Walking trails	Going to restaurants	Reading	Walking on beach
3	Museums	Walking trails	Going to restaurants	Swimming
4	Swimming	Reading	Walking trails	Boating/boating trips
5	Boating trips	Wine trail	Swimming	Walking trails

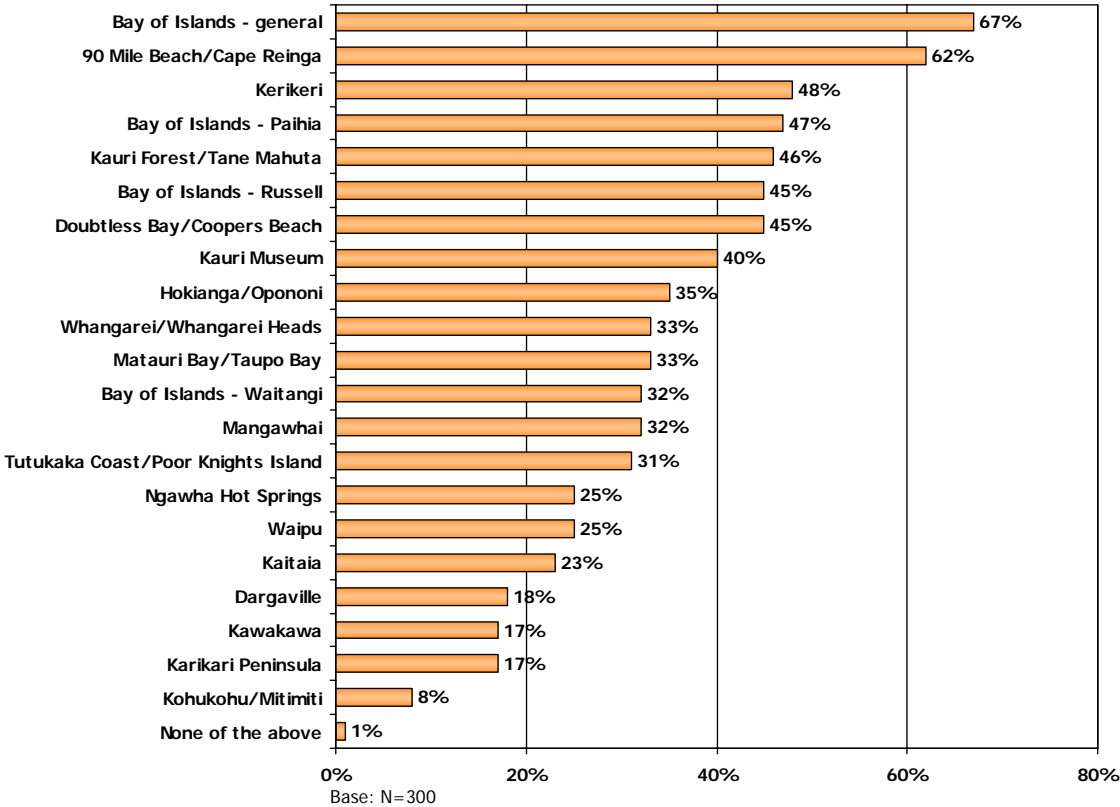
In the previous chart there is also an inclusion of what visitors believed Northland does not offer. Overall, most (63%) said Northland offered all the activities listed, however, amongst the activities mentioned, wine trails, art trails, and golf trails were the main activities visitors believe Northland does not offer.

### Prompted Places Visitors Would Like To Visit In Northland

In a similar scenario to the earlier questions, respondents were asked which, of a list of Northland destinations, would they like to visit while in Northland.

The following chart shows the places people would like to visit while on holiday in the Northland region

**Figure 9: Places People Would Like To Visit**



The Bay of Islands comes out on top, followed closely by Cape Reinga/90 Mile Beach. Specific Bay of Island locations, the Kauri Forest and Doubtless Bay, were the next group of places visitors rated as places they would like to visit.

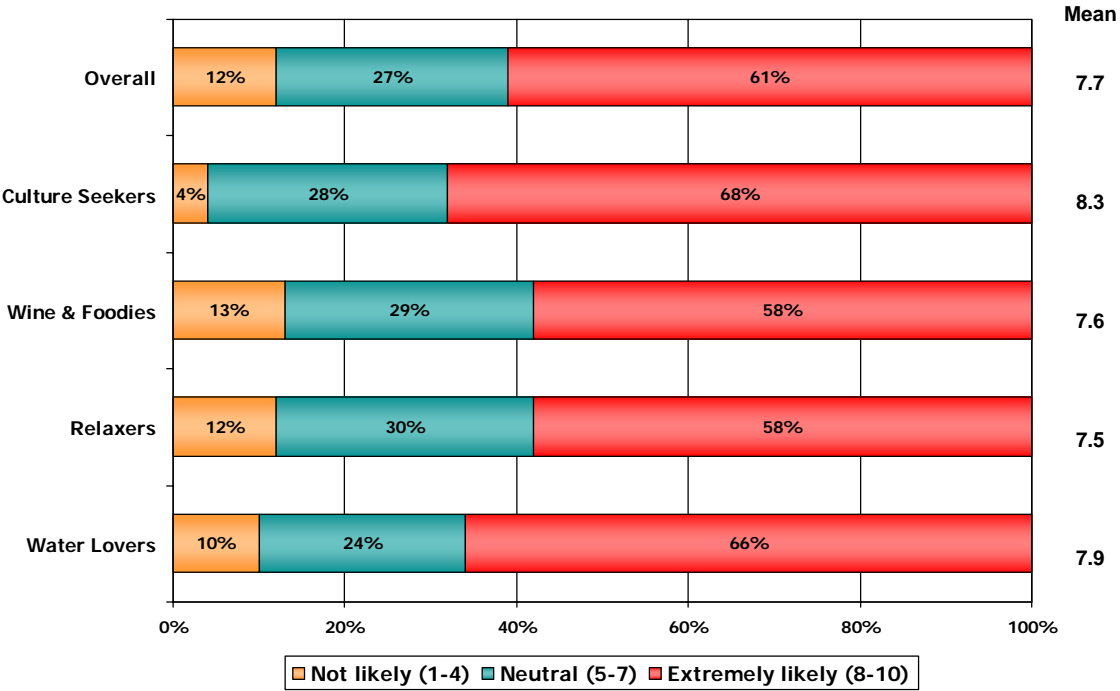
When this is split by segments, Culture Seekers mentioned more places in Northland, especially Waitangi, Kauri Museum, Kauri Forest, Kawakawa, Dargaville, Hokianga/Opononi. There were no other differences amongst the other segments.

**Overall**

Respondents were asked on a scale of one to ten where one how keen they are to holiday in Northland

The following table shows the grouped scores and corresponding means. The results are split by segment.

**Figure 10: Northland Holiday Aspiration**



Base: N=300

Overall, aspiration to holiday in Northland is very high, averaging 7.7 out of ten. Culture Seekers Aspiration to holiday in Northland was the highest amongst the four segments, averaging 8.3, followed by Water Lovers.

**Summary**

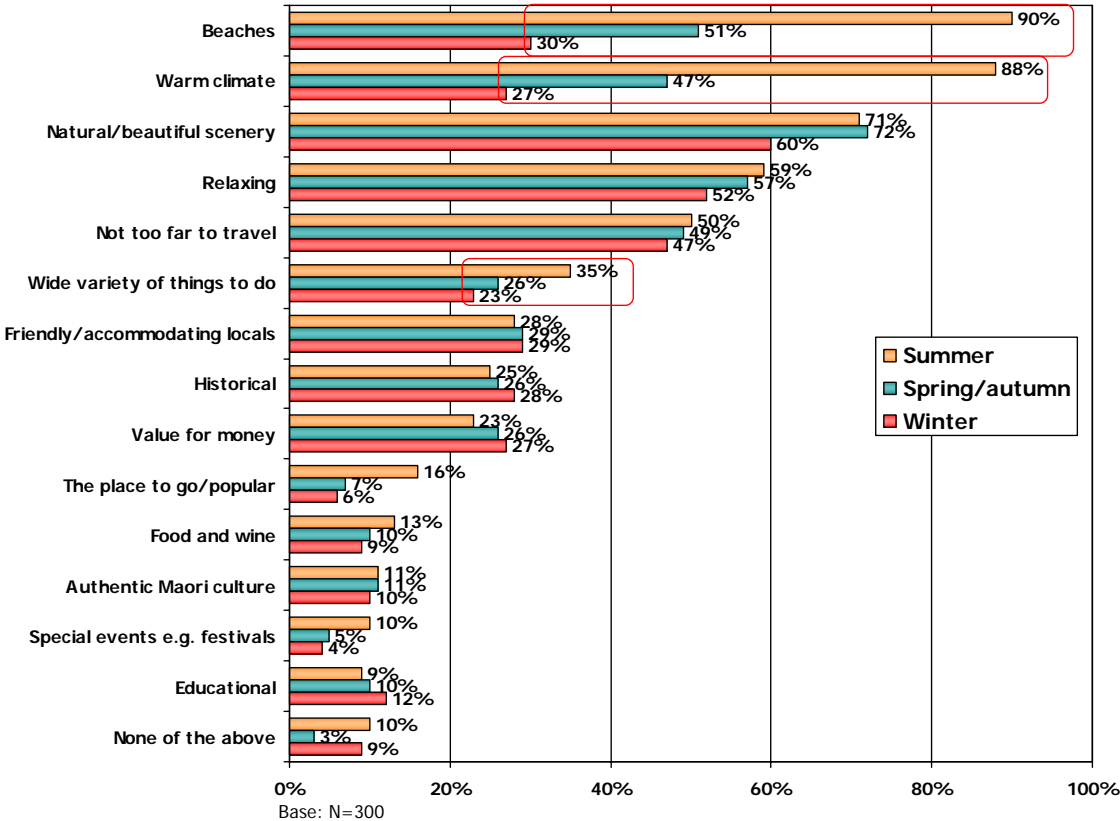
The associations with Northland in general tend to be summer based in terms of its drivers (beaches, natural/beautiful scenery, warm climate), activities (walking on the beach, swimming), and places to visit (Bay of Islands, 90 Mile Beach). However we need to look at the associations across the seasons in order to see what else can be leveraged in the shoulder and off peak season. We will look at the differences by season in the next section.

# Comparing the Seasons

In order to measure changes in drivers and activities in Northland across the season, we asked respondents to choose the drivers, activities and places they associated with Northland in summer. Then using the same drivers, activities and places we asked which statements they associated with Northland in spring and autumn, then finally associations in Winter.

The following chart shows drivers associated with Northland across the seasons

**Figure 11: Associations with the Northland Region over the Seasons**

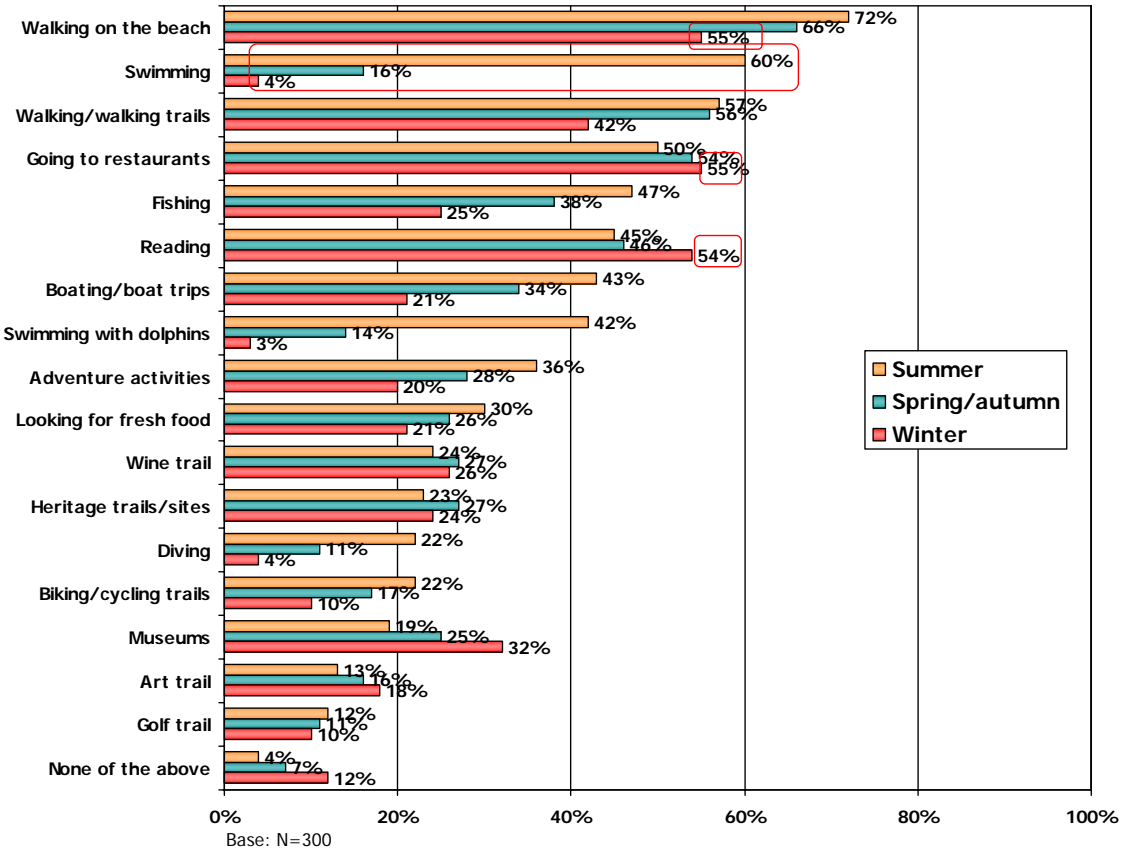


The two most powerful drivers for visiting Northland, beaches and warm climate, are the hardest hit in the shoulder and off-peak months for obvious reasons. A wide variety of things to do also decreases from 35% in summer to 23% in winter as many view the water based activities as not available/desirable outside of the summer months.

When the results are split by segment, Water Lovers are the main group that drops off in terms of a wide variety of things to do, as most of their activities are water based. There were no other major differences between the other segments.

The following table shows activities people like to do while on holiday in Northland across the seasons

**Figure 12: Activities in the Northland Region over the Seasons**



Activities visitors want to do experience more dramatic falls, particularly for water based activities such as swimming, fishing, boating, diving, etc. The areas that increase in the off season are going to restaurants, reading, visiting museums.

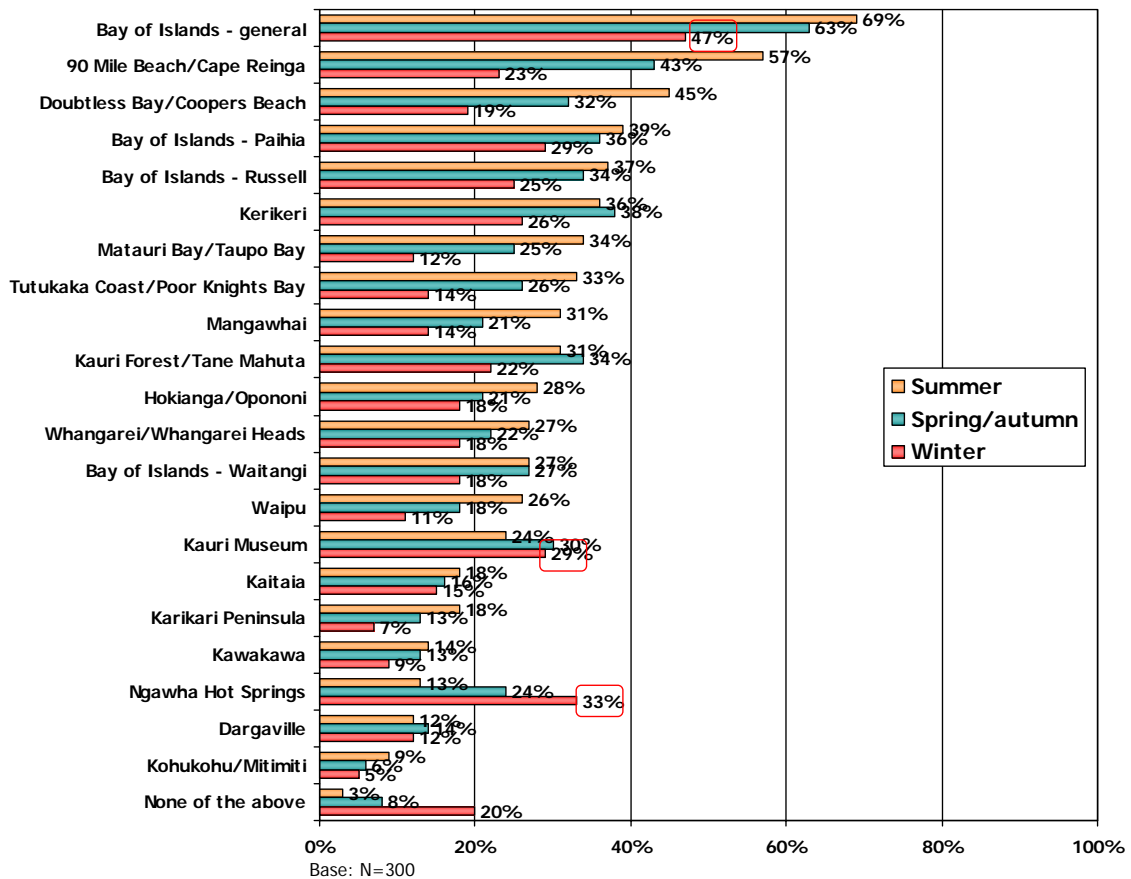
Despite a large drop off, walking on the beach still remains a popular activity in winter along with going to restaurants and reading.

When we look at the activities by segment we can see there are some activities that remain popular. Amongst Culture Seekers, heritage trails or sites and museums still are an appealing

option. These activities are also popular with Wine & Foodies as well as going to restaurants, wine and art trails. There are no other differences amongst Relaxers and Water Lovers.

The following bar chart shows places people would like to visit while on holiday

**Figure 13: Places People Would Like to Visit over the Seasons**



Most places lose their appeal over the winter months with the exception of the Kauri Museum and Ngawha Hot Springs. The Bay of Islands still remains the most popular despite a big drop in appeal in the off season.

Again Culture Seekers are more likely to visit most places in the Northland Region. This drops off in winter but is still stronger than the other groups. Wine and Foodies still remain interested in Kerikeri. There are no other differences amongst the other groups.

## Summary

With beaches and warm climate being at the top of the list of drivers, Northland is seen largely as a summer based holiday destination which matches peoples' main needs. Across the four segments Water Lovers are not surprisingly the hardest hit in the non-summer period. Water Lovers are a large segment, however there are three other segments that can potentially be wooed to the region through other means. Culture Seekers are especially resilient over the off-season and Wine & Foodies also find the region appealing in the colder months. What is needed is a focus to keep these segments coming to the region.

# How Does Northland Compare

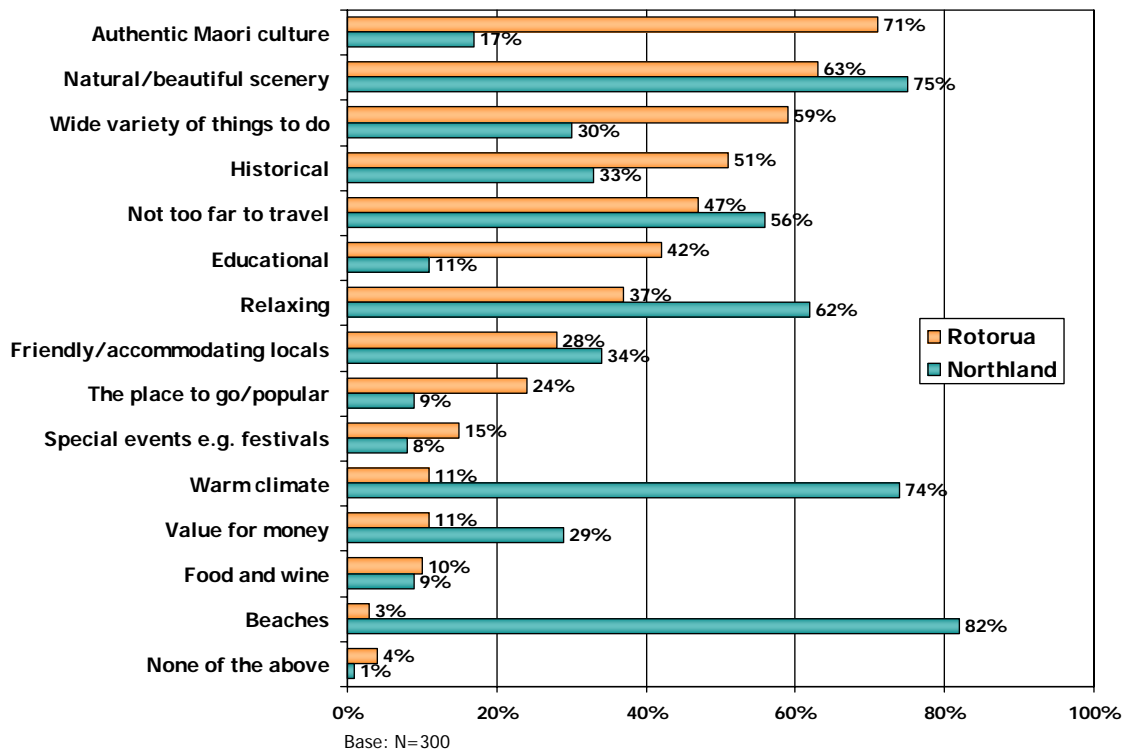
To gain insight into what Northland can offer there is a need to look at competing regions and see how to differentiate Northland and how to compete on similar offers.

For each of the regions we took the same reasons and activities we used to look at Northland and applied them to the four competitive regions (Rotorua Region, Queenstown, Coromandel, Taupo). Respondents selected the reasons or activities that they associated with that Region, which we could then compare to Northland.

## Rotorua Region

The following chart shows the reasons associated with the Rotorua Region compared to those associated with Northland

**Figure 14: Associations with the Rotorua Region vs. Northland**

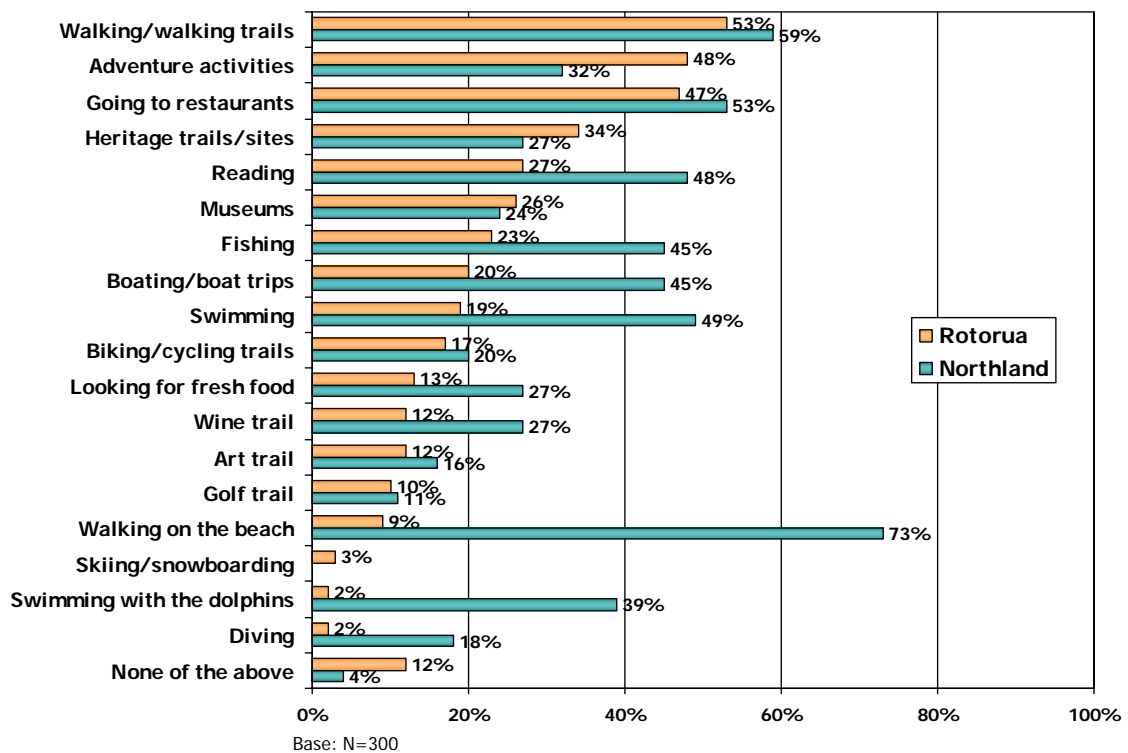


Rotorua clearly dominates in terms of authentic Maori culture, Rotorua also scores highly compared to Northland in variety of things to do, history, education and being popular.

Rotorua has a strong pull for Culture Seekers, especially with its historical and educational associations. Rotorua does not have strong summer associations, which is clear with “warm climate” which is dramatically lower than Northland, making Rotorua more of a year round attraction. There are no other differences amongst the other segments.

The following chart shows the activities people would like to do in Rotorua compared to the activities people like to do in Northland

**Figure 15: Activities in the Rotorua Region vs. Northland**

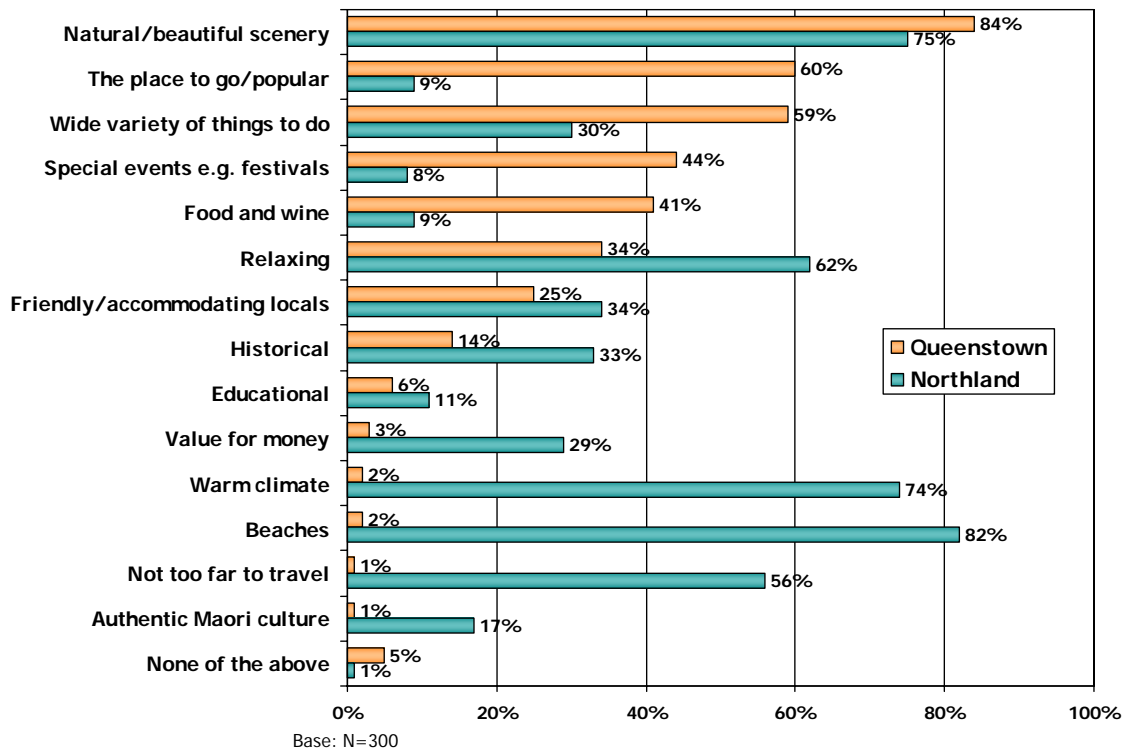


In terms of activities Rotorua doesn't have an advantage; however adventure activities and heritage trails/sites score well compared to Northland. Again Culture Seekers rated heritage trails and museums higher, emphasising the competition with Northland for this group. There were no other differences amongst the other segments.

## Queenstown

The following chart shows the reasons associated with Queenstown compared with those associated with Northland

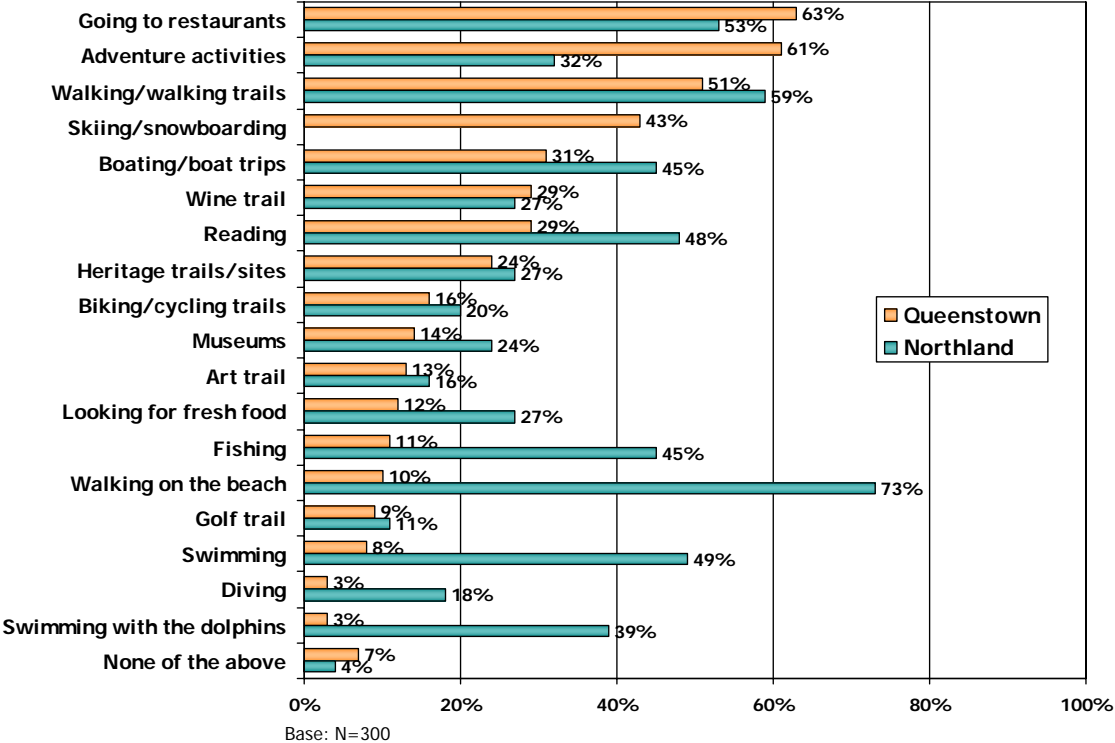
**Figure 16: Associations with Queenstown vs. Northland**



Queenstown has quite a distinctive image. Although a long distance to travel, Queenstown is a popular place to go with a wide variety of things to do, has natural/beautiful scenery and scores highly with special events (the winter festival) and food and wine.

The following chart shows the activities people would like to do in Queenstown compared to the activities people like to do in Northland

**Figure 17: Activities in Queenstown vs. Northland**



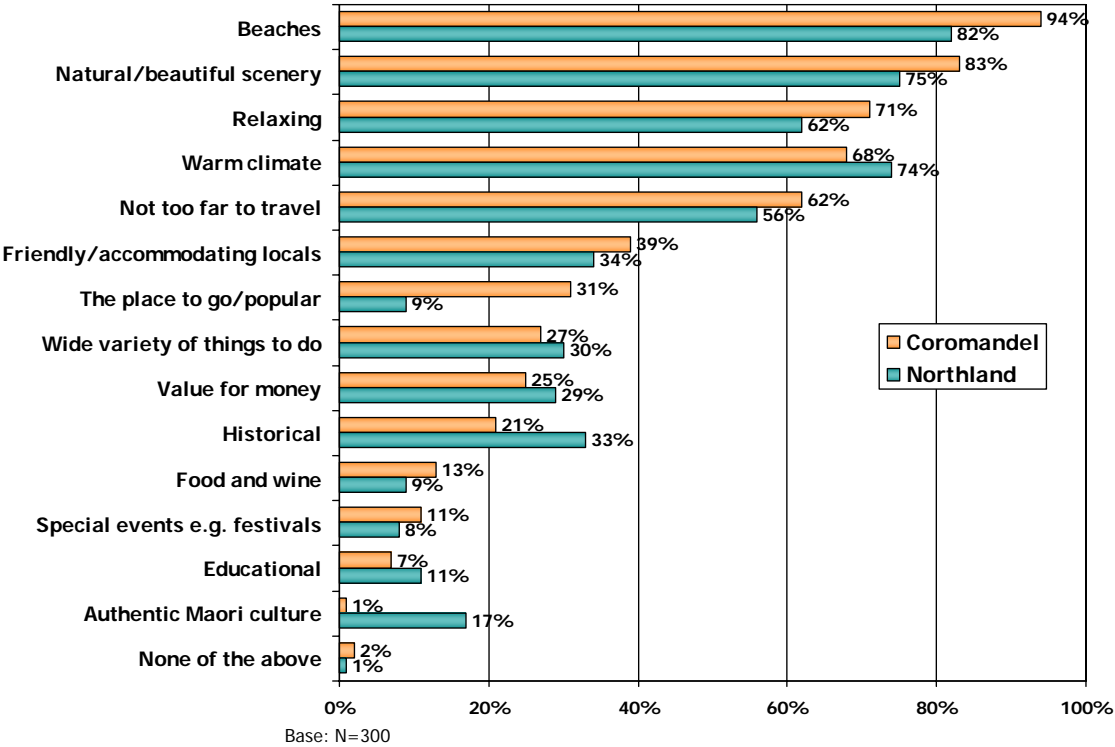
Queenstown is strong for restaurants, adventure activities and skiing/snowboarding. It is low on many of the water based activities.

Queenstown has a strong appeal amongst Water Lovers who travel to the region more for the adventure activities and the skiing/snowboarding. Wine and Foodies also associated Queenstown strongly with wine and food. There are no other differences amongst the other groups.

# Coromandel

The following chart shows the reasons associated with the Coromandel compared to those associated with Northland

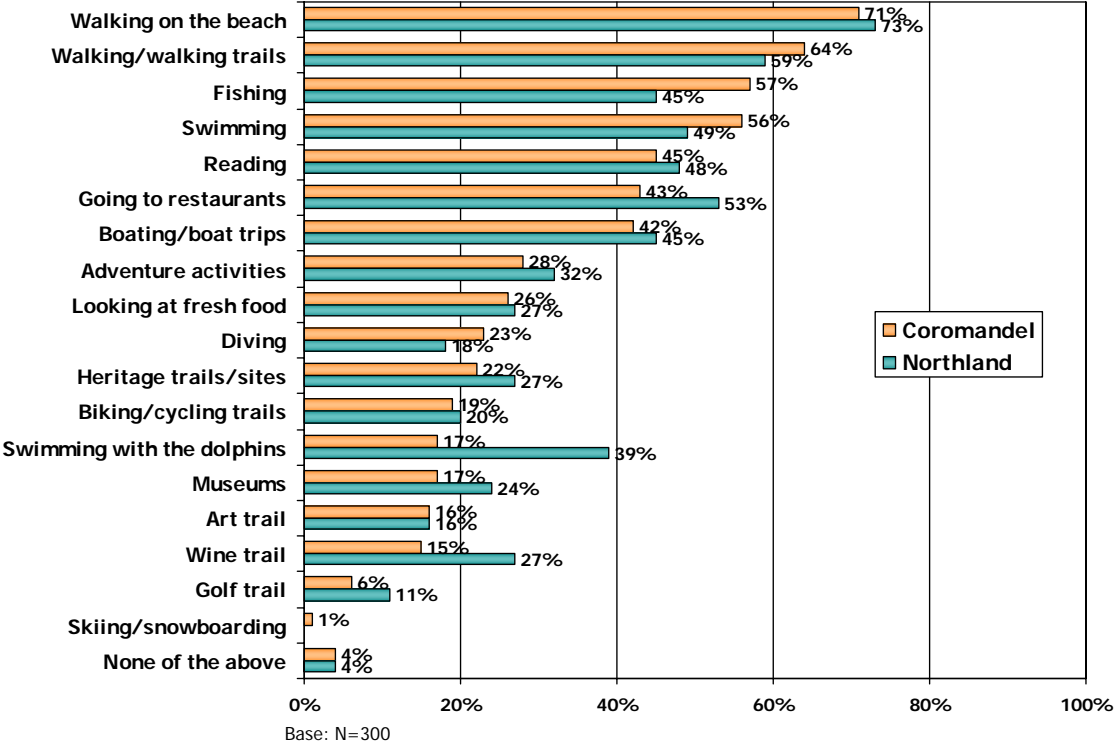
**Figure 18: Associations with the Coromandel vs. Northland**



The Coromandel is Northlands closest competition, both in terms of distance from Auckland/Waikato and in terms of what it offers. The Coromandel's top 5 associations closely match those of Northlands.

The following chart shows the activities people would like to do in the Coromandel compared to the activities people like to do in Northland

**Figure 19: Activities in the Coromandel vs. Northland**

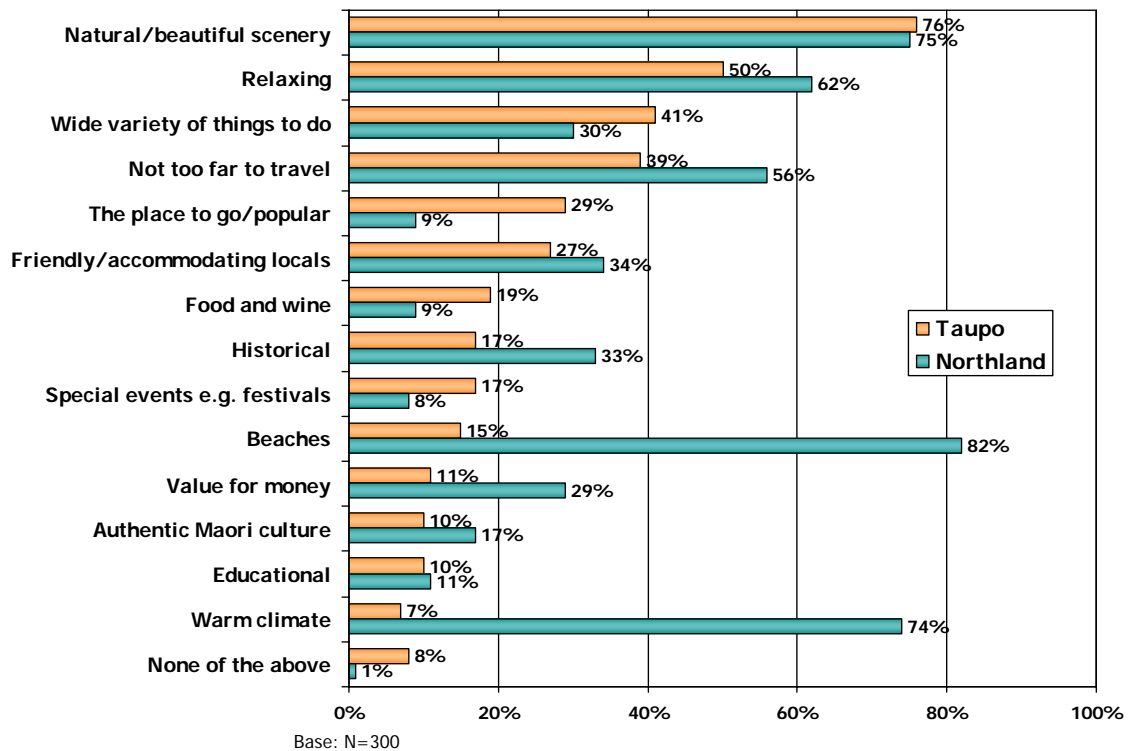


As with general associations, activities closely match those offered in Northland. It is ahead on fishing and swimming. This is where a clear differentiating image will help Northland gain an advantage over Coromandel.

## Taupo

The following chart shows the reasons associated with Taupo compared to those associated with Northland

Figure 20: Associations with Taupo vs. Northland

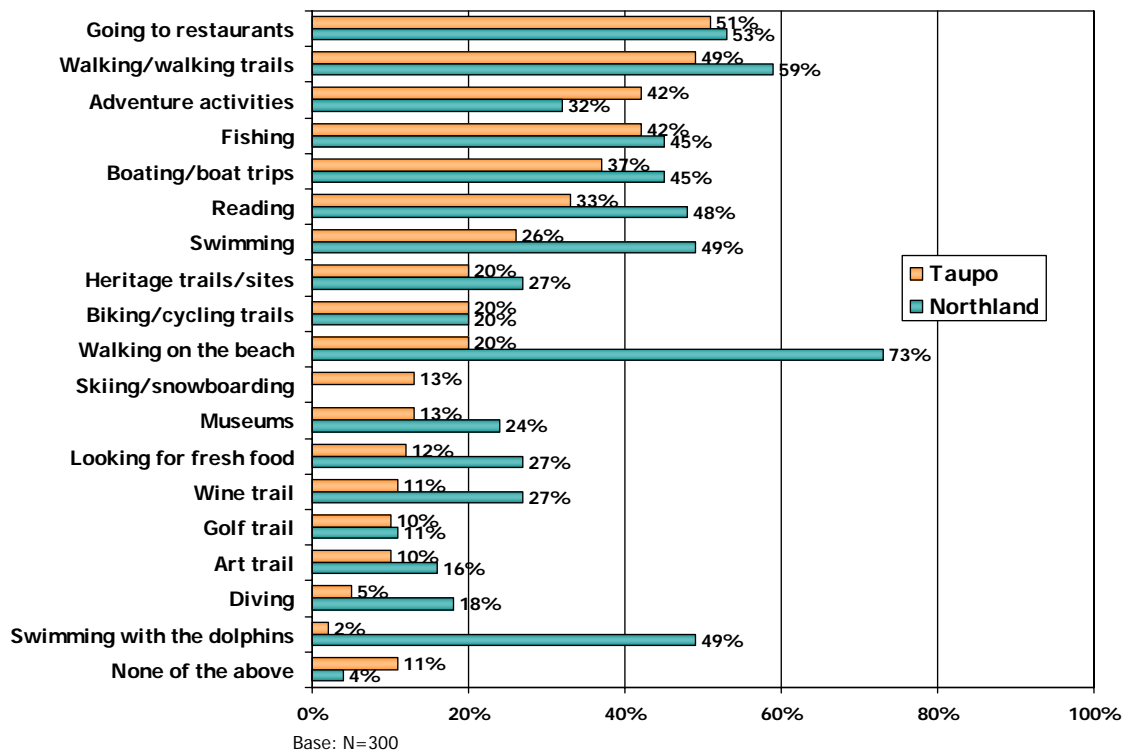


Taupo doesn't score strongly in many areas. It is seen to be a popular place to go and offers a wide range of things to do. Food and wine and festivals also score higher than Northland.

Given that our sample is current/potential Northland visitors, there may be a bias towards beaches over lakes in terms of water orientation.

The following chart shows the activities people would like to do in Taupo compared to the activities people like to do in Northland

**Figure 21: Activities in Taupo vs. Northland**



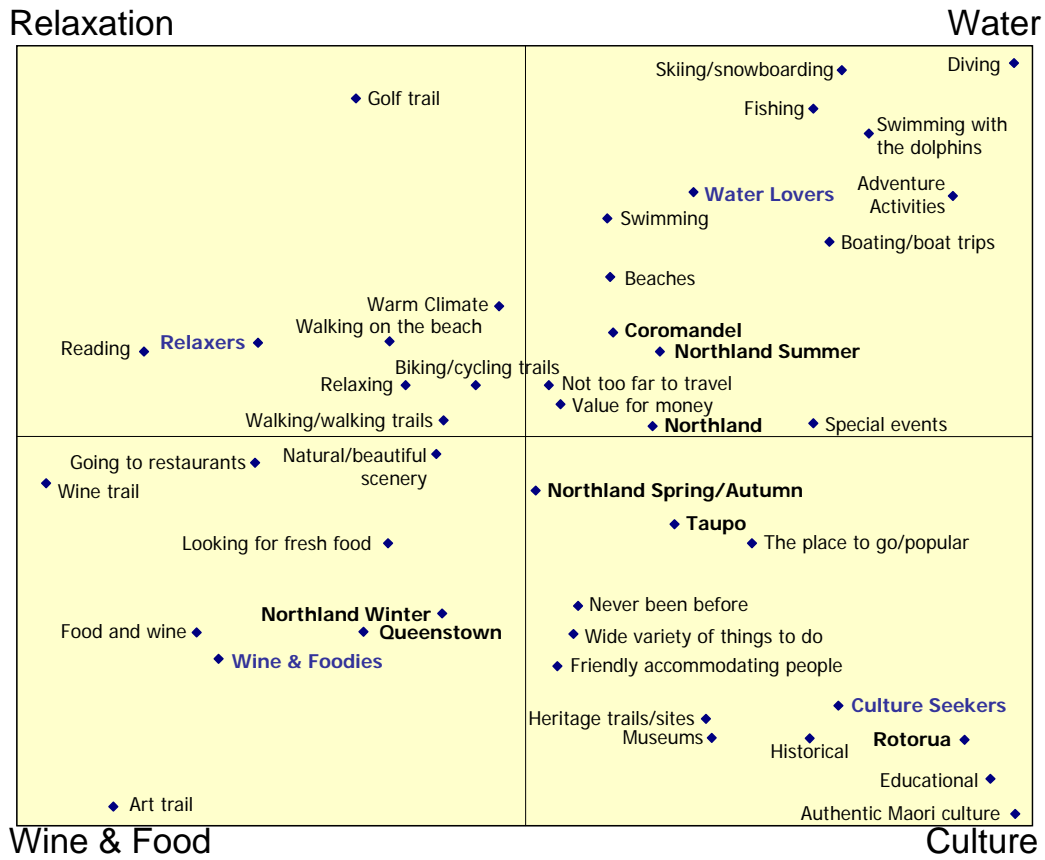
Again, Taupo doesn't have anything dramatically differentiating in terms of activities. Northland scores higher than Taupo on most activities, however Taupo does score high with adventure activities, especially amongst Water Lovers. There were no other differences amongst the segments.

## Overall Comparison

To facilitate comparison of all the competitive destinations it is easiest to look at where they fall comparatively on a map. To do this we mapped the reasons and activities using Correspondence Analysis. Reasons or activities that are enjoyed by the same people tend to fall in the same area. When the destinations are mapped based on their relative strengths, they pulled towards the reasons or activities they are commonly associated with and away from the ones they aren't.

The following map shows all destinations plotted based on their strengths in terms of reasons for visiting and activities, and the positions of the segments.

Figure 22: Destinations Brand Map



As above we can see that the region having a similar offer is the Coromandel, especially for the peak season. As Northland heads into the off peak months its positioning drifts towards Rotorua and Queenstown, which have stronger associations with the attributes that Northland should be leveraging more in the off season.

## Hygiene Factors

Associations with hygiene factors were also measured to see how Northland compared with the other regions. Respondents were given a list of statements and they choose the region or regions that they felt applied for each statement. Note that there was an option of don't know/none.

**Table 2: Hygiene Factors across Regions**

	Northland %	Rotorua Region %	Queenstown %	Coromandel %	Taupo %
Easy to get information about places/activities	62.8	<b>83.9</b>	78.6	50.2	62.5
Easy finding destinations on the map	75.5	79.0	66.3	69.8	79.2
Clear road signage to places/attractions	48.6	<b>64.0</b>	48.4	43.8	54.2
Clear signage for how far to next petrol station/toilet/food	21.8	25.9	17.9	19.2	27.4
Good quality roads including road works/signage of road works	<b>29.2</b>	<b>50.0</b>	35.4	26.3	<b>50.9</b>
Has good access to information/booking via internet	<b>45.5</b>	57.0	55.1	38.1	49.5
Easy to book/find accommodation in general	62.3	<b>72.7</b>	65.3	52.3	65.7
High standard of accommodation	<b>41.2</b>	6.1	73.0	32.0	63.9
Friendly locals	<b>60.6</b>	43.0	36.5	<b>59.1</b>	40.4
Access to beaches and coastlines	<b>87.7</b>	17.6	16.5	<b>82.9</b>	27.1
Lots of cultural activities	35.6	<b>87.4</b>	15.1	12.8	28.2
Lots of adventure activities	33.5	62.6	<b>83.5</b>	28.1	56.0
Lots of water based activities	<b>77.1</b>	42.0	47.7	67.3	<b>75.1</b>
Natural beauty/attractions	83.5	73.8	87.7	83.3	73.3
Access to activities for children	34.5	<b>47.2</b>	32.3	29.9	36.8
Easy to get there	79.2	81.5	33.7	77.6	75.1

From the table below we can see the direct comparison to the regions on several statements.

Where Northland excels;

- Friendly locals
- Access to beaches and coastlines
- Lots of water based activities

Where Northland falls down;

- Good quality roads including road works/signage of road works
- Has good access to information/booking via internet
- High standard of accommodation

Again we see Rotorua clearly dominating on cultural activities and also ease of getting information/booking, roads/signage and activities for children. The Coromandel again scores similarly (to Northland) on all attributes, but Northland tends to score slightly higher on all statements.

## Summary

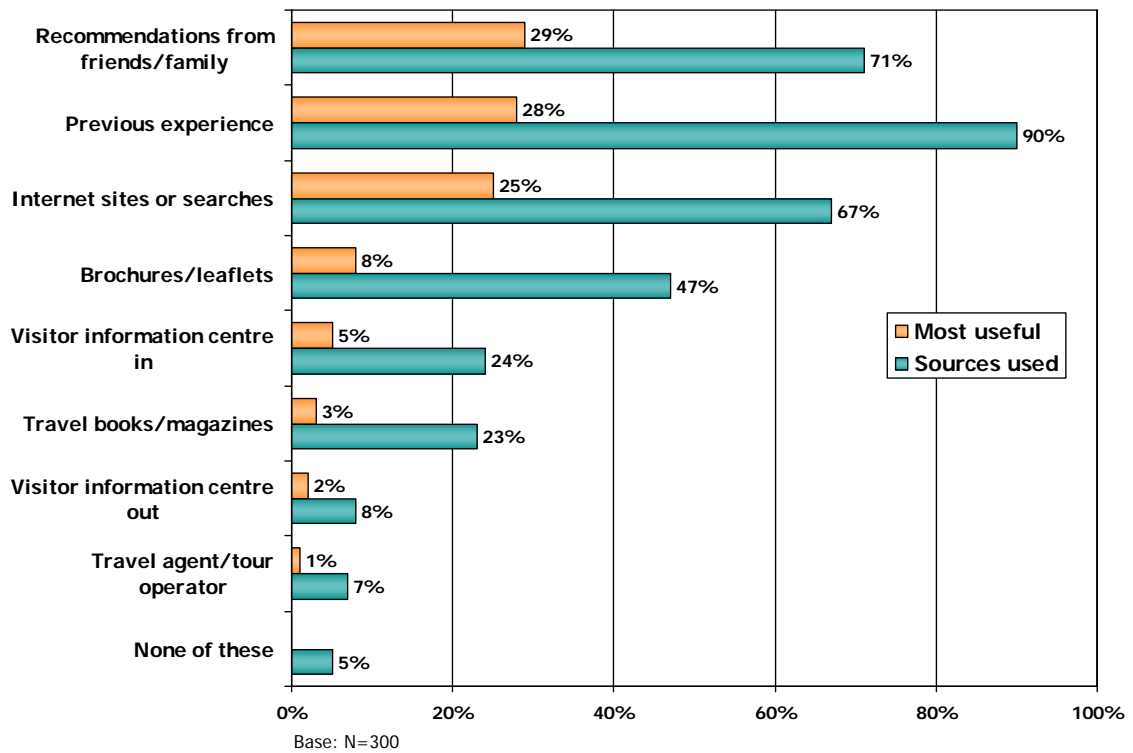
From this competitive analysis we can see Northland is similarly placed to the Coromandel but Northland has a slight edge. This edge comes mainly from unique offerings such as authentic Maori culture, history, restaurants and swimming with dolphins. However these offerings aren't strong enough to compete against the likes of Rotorua that dominate in cultural activities, especially authentic Maori culture. Therefore there is a need to differentiate Northlands offering from Rotorua for example by focusing on heritage/history rather than authentic Maori culture.

# Information Sources & Visitation Behaviour

Included in the research are questions on information sources and visitor behaviour.

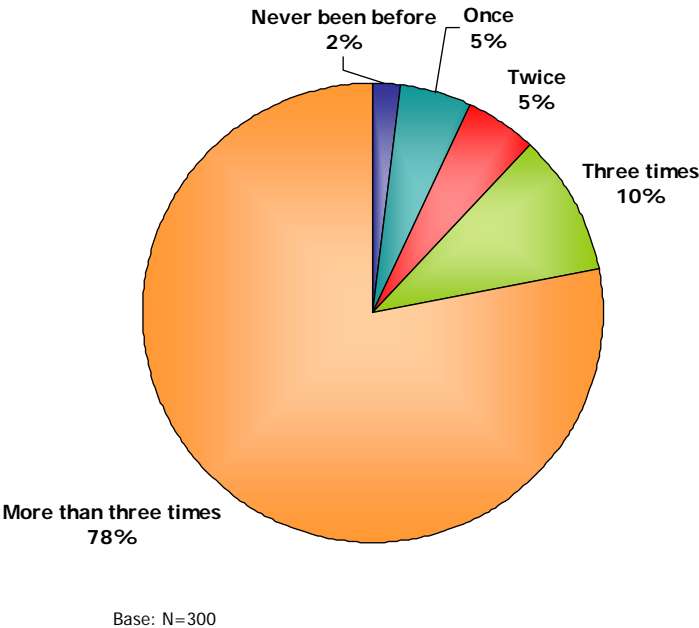
The following chart shows the information sources used when visiting or planning to visit Northland.

**Figure 23: Information Sources Used For Northland**



The three most useful sources of information for the Northland region are friends and family, previous experience, and Internet sites or searches. Information centres and brochures were mentioned by a minority.

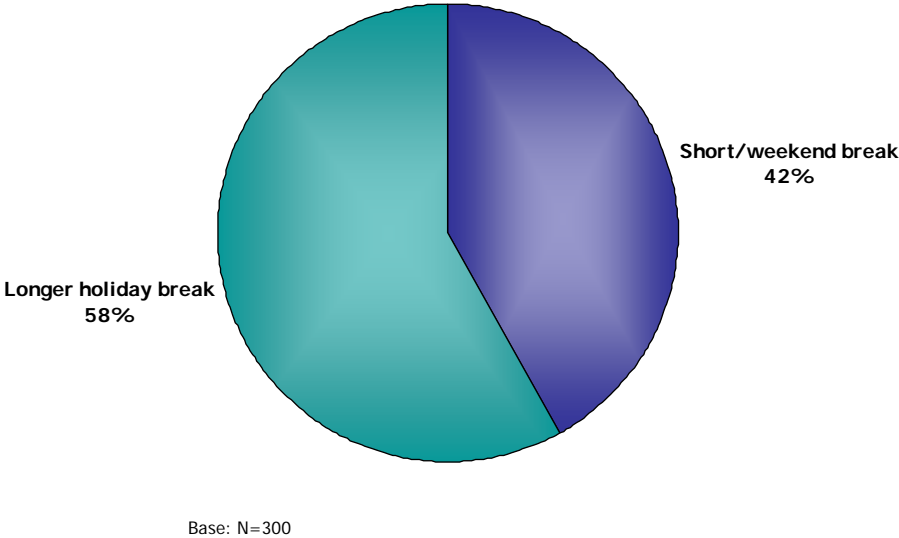
**Figure 24: Number of Visits to the Northland Region**



Most people are repeat visitors, 78% have been to Northland more than 3 times.

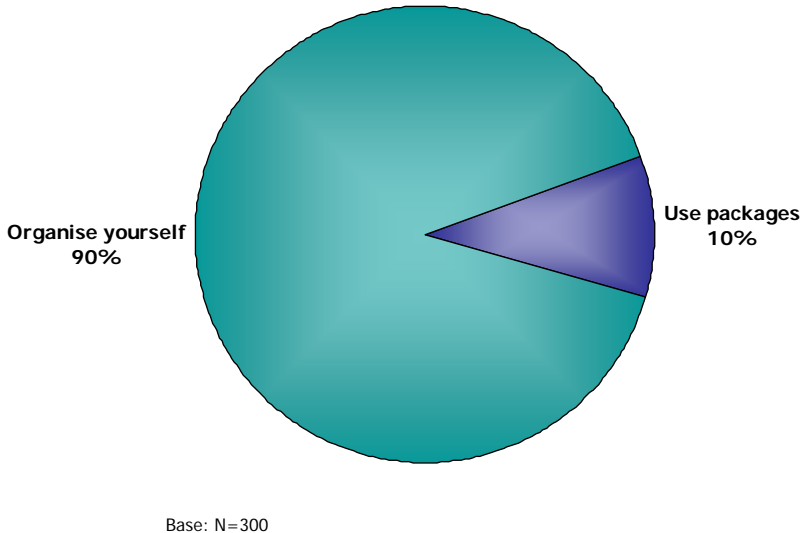
**Figure 25: Length of Stay Associated with Northland**

People were asked if they associate Northland more with a short weekend break or a longer holiday break.



A slight majority associated Northland with longer break. Those that associate Northland with a short or weekend break, were asked if they prefer to organise their holiday themselves or use packages.

**Figure 26: Preference Packages or Self Organised Holiday**



The large majority do not seek packages.

### Summary

Friends and family are the most common information source for those who have visited or plan to visit Northland. Therefore word of mouth is important to keep impressions positive through positive experiences. The Internet and brochures/leaflets are also good communication tools.

Most people have been to Northland more than three times which highlights the popularity of the region for those from Auckland and Waikato.

Visitation length swings slightly towards a longer stay but is fairly split and amongst those that do stay for a short period of time, they want to organise the trip themselves.

# Summary & Recommendations

---

In the total market, Northland is clearly the leading New Zealand destination for people from the Auckland and Waikato region. The leading competitor is Australia, overall competition from overseas destinations will increase further as the costs of travel continue to fall.

Looking specifically at those who have visited or plan to visit Northland, there are four distinct segments.

- Culture Seekers
- Wine and Foodies
- Relaxers
- Water Lover

Each of these segments travel for different reasons and enjoy different activities while on holiday. Each of these segments wants something different from Northland as a destination in summer and throughout the shoulder and off season. Each of these segments should be targeted separately to increase their visitation to the Northland Region.

The main associations with Northland tend to be summer based, therefore in the shoulder and off season many of its main attractions, such as beaches, water activities and swimming, become much less desirable. There is a need to shift the focus away from the water in these months.

The behaviour and attitudes of Culture Seekers and Wine and Foodies don't change as dramatically in the off season as Water Lovers. These two segments hold the greatest potential for increased visitation to the Northland region in the off season.

Firstly with Culture Seekers the focus should be on heritage. However, the Rotorua Region competes strongly in this area and dominates on authentic Maori culture. Northland can have a culture focus but needs to take a differentiated path, for example focus on the heritage and history of the region. Packaging the various sites and activities will help to bring the people to the region all year round.

Offering food (and wine) festivals will attract Wine & Foodies to the region. Wine is not one of Northland's strong points especially when compared to other regions. However, Northland is uniquely placed to offer authentic New Zealand cuisine. It scores highly in terms of looking for fresh food so a seafood focus could be an option. Going to restaurants is very popular so perhaps looking at a food trail or restaurant trail could have potential to draw in this segment during the colder months.

With Water Lovers it will be hard to get them to Northland as their focus is the water. However, they do have an adventure seeker side to them. Offering Adventure activities that are not water focused could be key to drawing in this segment of people in the off season.

Relaxers will be hardest to target as they don't want anything except a good book and some peace and quiet. Making sure Northland offers quality and cosy accommodation all year round that is away from the hustle and bustle of the busy Northland towns will provide what Relaxers are after.

Overall, Northland is a popular holiday destination for domestic travellers from Auckland and Waikato. By targeting the specific groups with what they want (i.e. less water/beach based), Northland has the potential to grow its market in the shoulder and off season.

# Appendix

Main reasons for choosing a holiday destination	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Natural/beautiful scenery	68%	81%	77%	69%	62%
Relaxing	64%	70%	58%	79%	59%
Beaches	59%	64%	37%	58%	73%
Warm Climate	51%	53%	35%	59%	55%
Value for money	40%	55%	31%	43%	41%
Wide variety of things to do	39%	66%	52%	30%	30%
Friendly/accommodating local p	35%	66%	38%	35%	21%
Not too far to travel	33%	45%	17%	40%	30%
Never been before	30%	47%	48%	17%	26%
Historical	24%	74%	38%	9%	10%
Special events e.g. festivals	16%	26%	15%	7%	22%
Food and wine	16%	15%	37%	11%	12%
Educational	11%	53%	6%	2%	3%
The place to go/popular	4%	6%	8%	0%	6%
Authentic Maori culture	4%	19%	2%	0%	1%
None of the above	2%	2%	2%	1%	2%

Associations with Northland - General	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Beaches	82%	81%	81%	80%	89%
Natural/beautiful scenery	75%	74%	88%	68%	76%
Warm Climate	74%	87%	75%	79%	69%
Relaxing	62%	70%	65%	64%	58%
Not too far to travel	56%	62%	52%	53%	61%
Friendly/accommodating local p	34%	49%	31%	32%	33%
Historical	33%	68%	58%	14%	24%
Wide variety of things to do	30%	45%	40%	21%	31%
Value for money	29%	32%	27%	23%	34%
Authentic Maori culture	17%	28%	31%	11%	10%
Educational	11%	34%	15%	6%	4%
Food and wine	9%	4%	17%	9%	9%
The place to go/popular	9%	13%	13%	2%	11%
Special events e.g. festivals	8%	15%	10%	5%	7%
None of the above	1%	2%	2%	0%	1%

<b>Associations with Northland - Summer</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Warm Climate	88%	89%	92%	93%	86%
Beaches	90%	89%	83%	91%	97%
Natural/beautiful scenery	71%	81%	85%	62%	72%
Not too far to travel	50%	62%	44%	48%	53%
Wide variety of things to do	35%	62%	38%	20%	40%
Authentic Maori culture	11%	23%	17%	6%	7%
Friendly/accommodating local p	28%	49%	29%	25%	26%
Relaxing	59%	70%	71%	59%	55%
Educational	9%	28%	15%	4%	4%
Historical	25%	60%	44%	10%	16%
Value for money	23%	36%	21%	15%	28%
The place to go/popular	16%	19%	25%	10%	18%
Food and wine	13%	13%	21%	10%	14%
Special events e.g. festivals	10%	19%	12%	4%	13%
None of the above	1%	0%	2%	1%	0%

<b>Associations with Northland – Spring/Autumn</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Warm Climate	47%	49%	52%	49%	45%
Beaches	51%	49%	56%	47%	59%
Natural/beautiful scenery	72%	79%	77%	70%	70%
Not too far to travel	49%	51%	48%	49%	52%
Wide variety of things to do	26%	47%	33%	16%	26%
Authentic Maori culture	11%	19%	15%	7%	9%
Friendly/accommodating local p	29%	47%	31%	26%	27%
Relaxing	57%	68%	71%	51%	55%
Educational	10%	28%	15%	2%	6%
Historical	26%	57%	48%	9%	18%
Value for money	26%	38%	23%	20%	28%
The place to go/popular	7%	9%	6%	4%	9%
Food and wine	10%	6%	17%	7%	11%
Special events e.g. festivals	5%	9%	6%	2%	5%
None of the above	3%	2%	2%	2%	3%

<b>Associations with Northland – Winter</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Warm Climate	27%	36%	31%	25%	24%
Beaches	30%	40%	31%	17%	39%
Natural/beautiful scenery	60%	72%	79%	47%	59%
Not too far to travel	47%	57%	42%	42%	53%
Wide variety of things to do	23%	40%	31%	11%	22%
Authentic Maori culture	10%	19%	15%	7%	6%
Friendly/accommodating local p	29%	45%	35%	23%	27%
Relaxing	52%	55%	63%	56%	45%
Educational	12%	36%	17%	4%	6%
Historical	28%	60%	54%	12%	17%
Value for money	27%	40%	21%	25%	30%
The place to go/popular	6%	11%	4%	1%	10%
Food and wine	9%	6%	12%	9%	11%
Special events e.g. festivals	4%	6%	0%	2%	6%
None of the above	9%	4%	6%	11%	12%

<b>Appealing Activities while on holiday</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Adventure Activities	31%	53%	13%	7%	50%
Fishing	34%	32%	13%	25%	60%
Diving	13%	13%	0%	1%	31%
Walking/walking trails	63%	66%	73%	58%	62%
Swimming with the dolphins	26%	26%	13%	14%	47%
Heritage trails/sites	28%	68%	54%	10%	16%
Golf trail	11%	2%	10%	12%	15%
Art trail	18%	19%	52%	9%	10%
Wine trail	31%	13%	69%	31%	26%
Biking/cycling trails	13%	11%	21%	7%	17%
Swimming	52%	47%	37%	48%	73%
Skiing/snowboarding	17%	9%	15%	2%	36%
Museums	26%	70%	38%	17%	9%
Going to restaurants	60%	51%	92%	63%	51%
Looking for fresh food	25%	30%	42%	20%	23%
Boating/boat trips	39%	47%	27%	21%	64%
Walking on the beach	77%	72%	75%	94%	79%
Reading	55%	34%	67%	83%	45%
None of the above	1%	0%	0%	0%	0%

<b>Appealing Activities in Northland - General</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Fishing	45%	45%	33%	32%	70%
Walking on the beach	73%	79%	83%	75%	69%
Swimming	49%	57%	35%	41%	62%
Boating/boat trips	45%	57%	46%	25%	62%
Walking/walking trails	59%	66%	71%	54%	57%
Swimming with the dolphins	39%	40%	37%	26%	54%
Going to restaurants	53%	47%	75%	57%	46%
Adventure Activities	32%	47%	19%	19%	45%
Reading	48%	40%	60%	64%	41%
Diving	18%	17%	12%	1%	38%
Looking for fresh food	27%	40%	42%	17%	25%
Biking/cycling trails	20%	21%	27%	11%	24%
Wine trail	27%	17%	52%	26%	22%
Heritage trails/sites	27%	53%	50%	15%	14%
Golf trail	11%	9%	12%	11%	13%
Art trail	16%	19%	38%	10%	10%
Museums	24%	64%	40%	14%	8%
None of the above	4%	2%	4%	4%	3%

<b>Appealing Activities in Northland - Summer</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Adventure Activities	36%	49%	17%	22%	52%
Fishing	47%	49%	29%	37%	69%
Diving	22%	21%	10%	9%	44%
Walking/walking trails	57%	64%	71%	51%	56%
Swimming with the dolphins	42%	43%	37%	35%	51%
Heritage trails/sites	23%	49%	40%	10%	16%
Golf trail	12%	11%	15%	11%	12%
Art trail	13%	17%	37%	6%	7%
Wine trail	24%	15%	38%	26%	24%
Biking/cycling trails	22%	23%	25%	14%	29%
Swimming	60%	66%	46%	59%	71%
Museums	19%	60%	33%	7%	5%
Going to restaurants	50%	53%	65%	54%	43%
Looking for fresh food	30%	38%	40%	25%	28%
Boating/boat trips	43%	51%	37%	28%	62%
Walking on the beach	72%	74%	75%	75%	73%
Reading	45%	43%	50%	57%	41%
None of the above	4%	2%	6%	4%	3%

<b>Appealing Activities in Northland – Spring/Autumn</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Adventure Activities	28%	40%	17%	12%	43%
Fishing	38%	38%	21%	27%	61%
Diving	11%	15%	2%	1%	23%
Walking/walking trails	56%	66%	69%	48%	54%
Swimming with the dolphins	14%	19%	13%	10%	16%
Heritage trails/sites	27%	55%	48%	14%	17%
Golf trail	11%	9%	13%	10%	13%
Art trail	16%	19%	38%	9%	11%
Wine trail	27%	19%	44%	26%	26%
Biking/cycling trails	17%	19%	25%	9%	19%
Swimming	16%	23%	8%	15%	18%
Museums	25%	62%	42%	15%	11%
Going to restaurants	54%	49%	71%	56%	49%
Looking for fresh food	26%	36%	37%	20%	23%
Boating/boat trips	34%	45%	31%	20%	47%
Walking on the beach	66%	70%	67%	72%	63%
Reading	46%	43%	48%	60%	41%
None of the above	7%	4%	8%	7%	7%

<b>Appealing Activities in Northland - Winter</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Adventure Activities	20%	30%	10%	5%	32%
Fishing	25%	30%	15%	11%	44%
Diving	4%	13%	2%	1%	4%
Walking/walking trails	42%	45%	56%	33%	41%
Swimming with the dolphins	3%	11%	0%	1%	4%
Heritage trails/sites	24%	51%	46%	11%	13%
Golf trail	10%	11%	12%	10%	10%
Art trail	18%	19%	40%	12%	10%
Wine trail	26%	17%	44%	23%	23%
Biking/cycling trails	10%	9%	15%	5%	13%
Swimming	4%	13%	0%	4%	2%
Museums	32%	68%	50%	19%	19%
Going to restaurants	55%	49%	79%	56%	51%
Looking for fresh food	21%	30%	37%	17%	15%
Boating/boat trips	21%	36%	17%	10%	27%
Walking on the beach	55%	60%	54%	53%	58%
Reading	54%	60%	62%	60%	48%
None of the above	12%	4%	10%	19%	11%

Activities Northland does not offer	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Wine trail	14%	21%	12%	12%	13%
Art trail	13%	15%	8%	15%	16%
Golf trail	8%	9%	10%	9%	7%
Swimming with the dolphins	7%	15%	8%	5%	7%
Museums	7%	2%	4%	9%	11%
Adventure Activities	4%	4%	4%	6%	4%
Going to restaurants	4%	0%	2%	5%	6%
Heritage trails/sites	3%	4%	0%	2%	4%
Biking/cycling trails	3%	6%	2%	1%	3%
Reading	3%	6%	0%	4%	2%
Looking for fresh food	2%	2%	2%	2%	2%
Walking/walking trails	1%	0%	2%	1%	1%
Fishing	1%	2%	0%	0%	1%
Diving	1%	4%	0%	0%	0%
Swimming	0%	2%	0%	0%	0%
Boating/boat trips	0%	0%	0%	0%	1%
Walking on the beach	0%	0%	0%	0%	1%
None of the above	63%	60%	65%	59%	60%

Places liked to visit in Northland - General	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Bay of Islands-General	67%	68%	77%	58%	72%
90 Mile Beach/Cape Reinga	62%	79%	58%	62%	55%
Kerikeri	48%	60%	67%	47%	35%
Bay of Islands-Paihia	47%	57%	60%	44%	40%
Kauri Forest/Tane Mahuta	46%	77%	63%	38%	28%
Bay of Islands-Russell	45%	62%	63%	35%	39%
Doubtless Bay/Coopers Beach/Ma	45%	60%	48%	33%	48%
Kauri Museum	40%	81%	56%	26%	25%
Hokianga/Opononi	35%	53%	42%	30%	28%
Whangarei/Whangarei Heads	33%	49%	23%	27%	37%
Matauri Bay/Taupo Bay	33%	45%	33%	23%	36%
Bay of Islands-Waitangi	32%	62%	46%	23%	21%
Mangawhai	32%	32%	27%	25%	40%
Tutukaka Coast/Poor Knights Is	31%	43%	44%	23%	29%
Ngawha hot Springs	25%	43%	21%	20%	24%
Waipu	25%	32%	27%	21%	23%
Kaitaia	23%	47%	19%	23%	17%
Dargaville	18%	43%	10%	16%	11%
Kawakawa	17%	38%	23%	12%	10%
Karikari Peninsula	17%	30%	19%	10%	15%
Kohukohu/Mitimiti	8%	23%	2%	4%	7%
None of the above	1%	0%	2%	1%	1%

Places liked to visit in Northland - Summer	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Bay of Islands-General	69%	74%	67%	67%	74%
Bay of Islands-Paihia	39%	55%	40%	33%	38%
Bay of Islands-Russell	37%	55%	46%	31%	35%
Bay of Islands-Waitangi	27%	53%	37%	16%	22%
Kauri Museum	24%	55%	31%	11%	16%
Kauri Forest/Tane Mahuta	31%	60%	38%	22%	22%
90 Mile Beach/Cape Reinga	57%	68%	52%	53%	57%
Kawakawa	14%	38%	19%	6%	9%
Ngawha hot Springs	13%	26%	13%	7%	14%
Whangarei/Whangarei Heads	27%	38%	27%	16%	31%
Kaitaia	18%	30%	19%	20%	14%
Kerikeri	36%	43%	56%	32%	30%
Mangawhai	31%	40%	23%	26%	36%
Waipu	26%	36%	21%	25%	27%
Doubtless Bay/Coopers Beach/Ma	45%	57%	44%	32%	55%
Dargaville	12%	32%	4%	9%	10%
Hokianga/Opononi	28%	51%	31%	22%	22%
Tutukaka Coast/Poor Knights Is	33%	47%	40%	20%	37%
Matauri Bay/Taupo Bay	34%	47%	25%	20%	46%
Karikari Peninsula	18%	32%	17%	11%	16%
Kohukohu/Mitimiti	9%	21%	8%	4%	8%
None of the above	3%	0%	6%	4%	0%

Places liked to visit in Northland – Spring/Autumn	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Bay of Islands-General	63%	74%	65%	56%	66%
Bay of Islands-Paihia	36%	47%	48%	27%	34%
Bay of Islands-Russell	34%	51%	46%	22%	33%
Bay of Islands-Waitangi	27%	49%	37%	15%	25%
Kauri Museum	30%	62%	42%	16%	19%
Kauri Forest/Tane Mahuta	34%	62%	46%	25%	25%
90 Mile Beach/Cape Reinga	43%	57%	46%	40%	38%
Kawakawa	13%	26%	19%	11%	7%
Ngawha hot Springs	24%	45%	25%	10%	25%
Whangarei/Whangarei Heads	22%	30%	23%	16%	23%
Kaitaia	16%	34%	13%	14%	14%
Kerikeri	38%	51%	56%	30%	32%
Mangawhai	21%	23%	17%	14%	27%
Waipu	18%	26%	15%	11%	21%
Doubtless Bay/Coopers Beach/Ma	32%	43%	38%	20%	36%
Dargaville	14%	34%	10%	10%	11%
Hokianga/Opononi	21%	36%	27%	16%	14%
Tutukaka Coast/Poor Knights Is	26%	36%	37%	12%	28%
Matauri Bay/Taupo Bay	25%	32%	27%	12%	29%
Karikari Peninsula	13%	26%	13%	5%	11%
Kohukohu/Mitimiti	6%	13%	8%	1%	6%
None of the above	8%	6%	8%	10%	5%

Places liked to visit in Northland – Spring/Autumn	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Bay of Islands-General	47%	60%	58%	36%	45%
Bay of Islands-Paihia	29%	43%	35%	23%	27%
Bay of Islands-Russell	25%	43%	37%	19%	20%
Bay of Islands-Waitangi	18%	43%	27%	5%	16%
Kauri Museum	29%	64%	40%	15%	18%
Kauri Forest/Tane Mahuta	22%	40%	31%	11%	20%
90 Mile Beach/Cape Reinga	23%	45%	25%	16%	18%
Kawakawa	9%	17%	17%	6%	5%
Ngawha hot Springs	33%	47%	37%	19%	39%
Whangarei/Whangarei Heads	18%	28%	25%	12%	17%
Kaitaia	15%	34%	12%	11%	13%
Kerikeri	26%	40%	42%	22%	16%
Mangawhai	14%	17%	19%	7%	15%
Waipu	11%	26%	8%	6%	12%
Doubtless Bay/Coopers Beach/Ma	19%	30%	25%	9%	21%
Dargaville	12%	28%	8%	11%	7%
Hokianga/Opononi	18%	34%	23%	15%	9%
Tutukaka Coast/Poor Knights Is	14%	19%	23%	6%	15%
Matauri Bay/Taupo Bay	12%	17%	19%	6%	13%
Karikari Peninsula	7%	15%	12%	2%	5%
Kohukohu/Mitimiti	5%	15%	6%	0%	3%
None of the above	20%	13%	13%	23%	21%

Associations with the Rotorua region	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Warm Climate	11%	17%	13%	7%	13%
Beaches	3%	0%	0%	2%	7%
Natural/beautiful scenery	63%	62%	75%	54%	66%
Not too far to travel	47%	57%	48%	43%	50%
Wide variety of things to do	59%	57%	69%	57%	58%
Authentic Maori culture	71%	81%	79%	72%	65%
Friendly/accommodating local p	28%	36%	37%	22%	24%
Relaxing	37%	40%	44%	31%	36%
Educational	42%	62%	56%	40%	32%
Historical	51%	72%	52%	47%	49%
Value for money	11%	13%	6%	10%	14%
The place to go/popular	24%	23%	27%	27%	22%
Food and wine	10%	9%	13%	10%	11%
Special events e.g. festivals	15%	21%	12%	12%	17%
None of the above	4%	4%	4%	2%	6%

Associations with Queenstown	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Warm Climate	2%	0%	2%	2%	3%
Beaches	2%	0%	0%	2%	4%
Natural/beautiful scenery	84%	87%	88%	86%	80%
Not too far to travel	1%	4%	2%	0%	0%
Wide variety of things to do	59%	66%	71%	56%	56%
Authentic Maori culture	1%	2%	2%	0%	0%
Friendly/accommodating local p	25%	32%	35%	21%	26%
Relaxing	34%	26%	46%	31%	37%
Educational	6%	17%	8%	2%	5%
Historical	14%	28%	17%	11%	10%
Value for money	3%	4%	6%	2%	3%
The place to go/popular	60%	51%	71%	67%	57%
Food and wine	41%	32%	58%	40%	41%
Special events e.g. festivals	44%	30%	38%	47%	54%
None of the above	5%	9%	4%	4%	4%

Associations with Coromandel	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Warm Climate	68%	62%	75%	74%	67%
Beaches	94%	89%	96%	96%	94%
Natural/beautiful scenery	83%	87%	94%	86%	78%
Not too far to travel	62%	77%	60%	60%	63%
Wide variety of things to do	27%	36%	29%	32%	21%
Authentic Maori culture	0%	0%	0%	1%	0%
Friendly/accommodating local p	39%	40%	46%	44%	36%
Relaxing	71%	81%	71%	80%	66%
Educational	7%	19%	10%	7%	2%
Historical	21%	47%	23%	15%	12%
Value for money	25%	30%	25%	25%	28%
The place to go/popular	31%	26%	31%	32%	36%
Food and wine	13%	4%	12%	20%	13%
Special events e.g. festivals	11%	6%	10%	12%	13%
None of the above	2%	2%	2%	1%	2%

<b>Associations with Taupo</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Warm Climate	7%	11%	6%	7%	8%
Beaches	15%	17%	15%	12%	17%
Natural/beautiful scenery	76%	85%	79%	77%	74%
Not too far to travel	39%	49%	37%	37%	40%
Wide variety of things to do	41%	68%	42%	33%	36%
Authentic Maori culture	10%	13%	12%	11%	8%
Friendly/accommodating local p	27%	30%	29%	30%	25%
Relaxing	50%	49%	62%	57%	46%
Educational	10%	23%	10%	5%	8%
Historical	17%	36%	15%	11%	13%
Value for money	11%	19%	13%	7%	11%
The place to go/popular	29%	30%	29%	21%	36%
Food and wine	19%	13%	21%	25%	18%
Special events e.g. festivals	17%	26%	15%	16%	15%
None of the above	8%	2%	10%	7%	8%

<b>Activities Associated with Rotorua region</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Adventure Activities	48%	60%	25%	36%	66%
Fishing	23%	26%	17%	15%	33%
Diving	2%	0%	0%	0%	5%
Walking/walking trails	53%	62%	71%	35%	58%
Swimming with the dolphins	2%	0%	0%	0%	5%
Heritage trails/sites	34%	55%	44%	27%	27%
Golf trail	10%	2%	10%	10%	13%
Art trail	12%	13%	25%	10%	8%
Wine trail	12%	6%	19%	2%	18%
Biking/cycling trails	17%	11%	17%	11%	25%
Skiing/snowboarding	3%	0%	4%	1%	5%
Swimming	19%	28%	17%	10%	26%
Museums	26%	51%	40%	20%	16%
Going to restaurants	47%	45%	63%	44%	46%
Looking for fresh food	13%	23%	25%	5%	10%
Boating/boat trips	20%	17%	21%	11%	30%
Walking on the beach	9%	13%	10%	6%	11%
Reading	27%	28%	37%	31%	21%
None of the above	12%	9%	10%	17%	11%

Activities Associated with Queenstown	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Adventure Activities	61%	64%	48%	52%	75%
Fishing	11%	11%	10%	11%	13%
Diving	3%	4%	4%	0%	5%
Walking/walking trails	51%	60%	69%	44%	43%
Swimming with the dolphins	3%	0%	2%	4%	4%
Heritage trails/sites	24%	45%	37%	16%	17%
Golf trail	9%	6%	13%	10%	7%
Art trail	13%	17%	35%	9%	5%
Wine trail	29%	30%	44%	27%	27%
Biking/cycling trails	16%	13%	19%	11%	19%
Skiing/snowboarding	43%	32%	35%	35%	61%
Swimming	8%	13%	12%	5%	8%
Museums	14%	38%	23%	4%	9%
Going to restaurants	63%	57%	71%	64%	61%
Looking for fresh food	12%	17%	19%	11%	9%
Boating/boat trips	31%	45%	31%	25%	34%
Walking on the beach	10%	17%	10%	6%	11%
Reading	29%	30%	37%	35%	25%
None of the above	7%	4%	10%	7%	6%

Activities Associated with Coromandel	Total	Culture	Wine & Food	Restful	Water
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Adventure Activities	28%	43%	10%	20%	38%
Fishing	57%	57%	42%	48%	74%
Diving	23%	23%	13%	15%	39%
Walking/walking trails	64%	70%	77%	63%	60%
Swimming with the dolphins	17%	11%	19%	12%	23%
Heritage trails/sites	22%	40%	35%	16%	12%
Golf trail	6%	6%	10%	4%	7%
Art trail	16%	17%	35%	14%	9%
Wine trail	15%	6%	23%	19%	15%
Biking/cycling trails	19%	15%	25%	14%	21%
Skiing/snowboarding	0%	0%	2%	0%	0%
Swimming	56%	53%	38%	58%	69%
Museums	17%	45%	27%	7%	7%
Going to restaurants	43%	38%	58%	48%	36%
Looking for fresh food	26%	26%	31%	25%	28%
Boating/boat trips	42%	38%	42%	35%	52%
Walking on the beach	71%	74%	75%	72%	73%
Reading	45%	34%	56%	58%	39%
None of the above	4%	2%	6%	2%	2%

<b>Activities Associated with Taupo</b>	<b>Total</b>	<b>Culture</b>	<b>Wine &amp; Food</b>	<b>Restful</b>	<b>Water</b>
<b>Sample Size</b>	<b>300</b>	<b>47</b>	<b>52</b>	<b>81</b>	<b>100</b>
Adventure Activities	42%	47%	21%	35%	58%
Fishing	42%	47%	35%	37%	52%
Diving	5%	4%	4%	0%	11%
Walking/walking trails	49%	66%	60%	38%	44%
Swimming with the dolphins	2%	2%	2%	0%	4%
Heritage trails/sites	20%	45%	25%	12%	15%
Golf trail	10%	6%	8%	15%	10%
Art trail	10%	11%	27%	9%	4%
Wine trail	11%	4%	21%	6%	15%
Biking/cycling trails	20%	15%	25%	11%	28%
Skiing/snowboarding	13%	6%	17%	5%	21%
Swimming	26%	30%	23%	27%	25%
Museums	13%	30%	21%	4%	9%
Going to restaurants	51%	55%	56%	57%	49%
Looking for fresh food	12%	19%	19%	10%	9%
Boating/boat trips	37%	38%	40%	33%	42%
Walking on the beach	20%	30%	19%	15%	23%
Reading	33%	30%	38%	47%	28%
None of the above	11%	9%	12%	14%	9%